EPA Financial Services

2040 US Highway 9, Toms River, NJ 08755
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Menu of Services

Comprehensive Financial Planning With Investment Planning	One Time Financial Planning No Investment Planning	A La Carte Planning
All Areas are included & the price is for ongoing planning and updates each year until canceled by either party. Unlimited meetings and or questions.	*All Areas are included*	*Some areas require more than two meetings. Prices include questions on the menu item chosen for one year in addition to any meetings necessary to complete the chosen menu item.*
1. Retirement Planning	1. Retirement Planning	1. Divorce Consulting = **$300**
2. Employee Benefits	2. Employee Benefits	2. Retirement Planning = **$250**
3. Estate Planning *	3. Estate Planning *	**3.** Employee Benefits = **$250**
4. Risk Management	4. Risk Management	4. Estate Planning * = **$200**
5. Tax Information*	5. Tax Information*	5. Risk Management = **$200**
6. Asset Allocation	6. Asset Allocation	6. College Savings = **$150**
7. College Savings	7. College Savings	7. Budget Analysis = **$150**
8. Budget Analysis	8. Budget Analysis	8. Asset Allocation = **$100**
		9. Purchase Planning = **$100**
$300 / per year	**$500**	

Investment Fees/ Commissions

Management Charges = Our Managed Accounts have annual charge that ranges from .75% and 1.35% per year depending on several factors including but not limited to the value of the account(s).

Commission Based Accounts = Commission charges are based on the investment product, the company, and any imposed charges for extra features.

*We do not offer tax or legal advice. For advice concerning your own situation, please consult with your appropriate professional advisor.