Our Pricing

At ReFrame Wealth, we sit next to our clients—not on the opposite side of a negotiating table. When you win, we win. This partnership approach is reflected in our transparent pricing. We believe that you deserve to know exactly how much you're paying, and what you get in return.

ReFrame Wealth offers fee-only services with a fee that is calculated as a percentage of the assets that we manage (or advise on) for you. We believe that our pricing model provides you, our client, with cost-effective, comprehensive financial services—without having to worry about expensive proprietary products, hourly fees, or commissions.

Billing for accounts managed directly by ReFrame Wealth

Your Assets Under Management (AUM) fee covers investment management, the financial planning that our team does on your behalf, as well as Life Care Planning with LionHeart Eldercare & Consulting. See our Investment Advisory Agreement for more billing details.

Assets Under Management ($)	Annual Rate (%)
Up to $2,000,000	1.00%
Next $3,000,000	0.75%
Next $5,000000	0.50%
Over $10,000,000	0.40%

ReFrame Wealth charges a $6,000 annual minimum fee.