

Flat Fee. Infinite Possibility.

Priced for the work we do — not the wealth you have.

The Problem with AUM



Your fee grows as your assets grow — even if the work stays the same.

It's a fee on what you've built, not the work being done.

Many advisory firms use a pricing model called Assets Under Management (AUM) — where you pay a percentage based on your portfolio size.

While AUM may work well for some investors, we believe our flat-fee model better reflects the value and scope of the work we do.

Here's why that matters:

- 1. With AUM, you may pay more as your wealth grows** — even if nothing else changes.
- 2. Firms that charge AUM often bundle services** — so you may end up paying for things you don't need (or never use).

The Sanctuary Way



We price based on the actual planning, care, and coordination your life requires.

Not your account balance.

At Sanctuary, we believe pricing should be **transparent, customized, and fair** — built around you, not your portfolio.

Here's how we do things differently:

- 1. No bundling.** Planning and investment services are priced separately.
- 2. No wealth penalty.** Fees reflect your needs — not your net worth.
- 3. No surprises.** We review your pricing annually, together.

More for What Matters



You keep more of your wealth — and put it toward what matters most.

Because smart, transparent pricing gives you greater freedom to spend, give, travel, and grow — on your terms.

When fees are based on the work being done — not the size of your portfolio — more of your money stays available for the life you want to live.

Over time, that could mean:

- 1. A more meaningful retirement**
- 2. More generous giving**
- 3. More freedom to enjoy life**

You've worked hard to build your wealth.

Let it work for you — not against you.

Let's build a plan — and a pricing structure — that works for your life.