

Willow Planning Group, LLC

Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about Willow Planning Group, LLC advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	0.85%-0.75%* *inclusive of 0.20% third party money manager fee	Quarterly in arrears	Portfolio Management; Pension Consulting Services
Hourly Fee	Between \$100 and \$200	One half paid up-front; One half paid on completion of work	Financial Planning services
Subscription Fee	\$0	N/A	
Fixed Fee	Up to \$2,000 initial fee; and ongoing fee up to \$300; \$400 initial fee and \$120 ongoing fee; \$600; and \$1,000	Initial fee paid up-front; ongoing fee paid monthly;\$400 fee-\$200 up-front and \$200 on completion and \$120 per quarter in advance; \$600 two-hour planning session paid in advance; \$1,000-over 12 months-\$500 up front and \$500 on delivery of plan	Financial Planning Services
Commissions to the Adviser	\$0	N/A	
Performance-based Fee	\$0	N/A	
Other	\$50	Per person, per event	Educational Workshops
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	0.20%	Quarterly in arrears	Portfolio Management
Robo-Adviser Fee	\$0	N/A	
Talk with your Adviser about fees and costs applicable to you			

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Betterment Securities
Commissions	No	
Custodian Fees	No	
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes/No	Betterment Securities

Effective September 5, 2019