

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 | \$200 | \$200 paid up-front; hourly work billed monthly upon completion of work performed | Financial Planning services |
| Subscription Fee | \$0 | N/A | |
| Fixed Fee | Up to \$2,000 initial fee; and ongoing fee up to \$300; up to \$600 initial fee and up to \$180 quarterly fee; \$600; and \$1,000 | Initial fee paid up-front; ongoing fee paid monthly; up to \$600 one half up-front remainder due on delivery of plan; up to \$180 per quarter; \$1,000-over 12 months-\$500 up front and \$500 on delivery of plan | Comprehensive, Fixed Fee or a la carte 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: February 21, 2020