

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*	N/A	*investment advisory services no longer offered. Current clients will transition out of this service in 2021
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 \$3,000 initial fee; and ongoing fee up to \$500; up to \$600 initial fee and up to \$180 quarterly fee; 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		*see above.
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	
Commissions	No	
Custodian Fees	No	
Mark-ups	No	
Mutual Fund/ETF Fees and Expenses	Yes/No	

Effective: March 3, 2022