GGM WEALTH ADVISORS

Powered By
New South Wealth Management

MATT HIGHTOWER
Wealth Management Advisor

985-789-5013
matt@ggm-wealth.com
www.ggm-wealth.com
829 Asbury Dr Suite 3
Mandeville, LA 70471

FINANCIAL PLANNING
FEES AND SERVICES

Our goal is to provide clarity, confidence, and a custom plan designed around what matters most to you. Choose the level of guidance that fits your needs today—and grows with you tomorrow.

SERVICES INCLUDED	ESSENTIAL Foundational Guidance	CONTROL Strategic Advisory	FREEDOM Private Client Partnership
Access to Financial Planning Tools	✓	✓	✓
Financial Plan	✓	✓	✓
Financial Organization	✓	✓	✓
Insurance Policy Review	✓	✓	✓
Cash Flow Analysis	✓	✓	✓
Student Loan Planning	✓	✓	✓
Portfolio Review	✓	✓	✓
Employee Benefit Review	✓	✓	✓
College Planning	✓	✓	✓
Employer Retirement Plan Maximization	✓	✓	✓
Retirement Income Planning	✓	✓	✓
Social Security Planning	✓	✓	✓
Tax Planning & Projections	✓	✓	✓
Estate Planning	—	✓	✓
Business Planning	—	—	✓
Corporate Retirement Plan Optimization	—	—	✓
Frequency of Review Meetings	SEMI-ANNUALLY	QUARTERLY	AS NEEDED
PLANNING FEES[1]			
One-Time Strategy Engagement	$3,500	$5,000	$7,500+
Ongoing Advisory Fee (Starting Month Two)	$250 / month	$500 / month	$750–$1,500+ / month
INVESTMENT MANAGEMENT SERVICES FEES[2]			
$0 – $99,999	1.75%	1.25%	1.10%
$100,000 – $249,999	1.60%	1.00%	1.00%
$250,000 – $499,999	1.50%	0.90%	0.90%
$500,000 – $999,999	1.40%	0.75%	0.75%
$1,000,000 – $1,999,999	1.25%	0.50%	0.50%
$2,000,000 – $4,999,999	1.00%	0.25%	0.25%
Over $5,000,000	0.75%	0.25%	0.25%

1. Planning fees are billed directly by GGM Wealth Advisors. Fees may vary based on the complexity of your situation and the scope of services provided.
2. Investment Management Services are optional and charged by the advisor. Fees listed above do not include underlying fund, manager, or platform expenses.

WHAT'S INCLUDED IN YOUR PLAN

STRATEGIC GUIDANCE
Proactive planning, personalized recommendations, and ongoing support to help you reach your goals.

MEETINGS & REVIEWS
Regular strategy meetings and ongoing plan reviews to keep you on track.

INVESTMENT OVERSIGHT
Objective portfolio monitoring and guidance aligned with your risk tolerance and goals.

TAX-AWARE PLANNING
Tax-efficient strategies designed to help you keep more of what you earn.

RISK MANAGEMENT
Insurance and risk analysis to help protect what matters most to you.

COORDINATION
Collaboration with your CPA, attorney, and other professionals to simplify your financial life.

ONGOING SUPPORT
Access to your advisor and our team whenever you need clarity or guidance.

Your plan. Your goals. Our ongoing partnership.