**Schmerge Executive Planning Services, Inc. DBA "Wurz Financial Services" / "The Lawyer Millionaire**

*Financial Planning Engagement Letter*

Welcome to Wurz Financial Services! We will assist you in the creation, implementation, and ongoing monitoring and management of your comprehensive financial plan, including, but not limited to, the following areas: financial health and wellness, goal setting and visioning, investment planning, business strategy, cash flow, tax planning, retirement planning, estate planning, insurance planning, money scripts and financial psychology, college planning, and additional areas as appropriate.

| Foundational | Premium | Concierge | Exclusive |
|---|---|---|---|
| Comprehensive Financial Plan and Monthly Planning Schedule<br><br>Quarterly 50-min. strategy / coaching session<br><br>Monthly financial dashboard review and updates | Comprehensive Financial Plan and Monthly Planning Schedule<br><br>Bi-monthly 50-min. strategy/coaching session<br><br>Monthly financial dashboard review and updates<br><br>1 Advanced Planning Project Per Quarter | Comprehensive Financial Plan and Monthly Planning Schedule<br><br>Monthly 50-min. strategy / coaching session<br><br>Bi-weekly dashboard review and updates<br><br>2 Advanced Planning Projects Per Quarter<br><br>Business Value Maximization and Exit Planning Strategy | Comprehensive Financial Plan and Monthly Planning Schedule<br><br>Monthly 50 min. strategy / coaching session<br><br>Weekly financial dashboard review and updates<br><br>3 Advanced Planning Projects Per Quarter<br><br>Business Value Maximization and Exit Planning Strategy |

ADDITIONAL PROVISIONS

1. LIMITATIONS ON SCOPE OF SERVICES. It is expressly understood and agreed between the parties of this Agreement that our firm will not provide accounting or legal advice no prepare any accounting or legal documents for the implementation of the financial planning objectives. You are urged to work closely with your attorney and/or accountant in implementing the recommendations set forth in the financial plan.

2. ADV ACKNOWLEDGEMENT. View and download Form ADV Part 2 here: https://adviserinfo.sec.gov/firm/brochure/120059. Client acknowledges receipt of Part 2 of Form ADV; at or before the time of signing this agreement in accordance with Rule 204-3 under the Investment Adviser's Act of 1940.

3. CONFIDENTIALITY. All analysis and recommendations are based solely on the information which you submit to us. Copies of documents, papers, or other useful information will be retained by us in your client file for future use, unless you specifically tell us otherwise. Any information given to us will be kept strictly confidential to the extent allowed by law.