

Wealth Planners, LLC
(Custodial fees for accounts held at Raymond James)

Annual Account Fees

- Traditional, Roth, SEP or Simple.....\$40.00
- Spousal IRA (Traditional or Roth).....\$40.00

(The annual fee is assessed 12 months **after the account is established** and every 12 months thereafter. You will receive a letter from Raymond James when this is due with 2 options to pay. You can either send in a check to Raymond James or have it deducted from your account.)

Account Termination Fees

- Fee to close account (in addition to prorated annual fee).....\$100.00

By signing this form, you acknowledge and agree to the fees listed above.

Client signature

Date

Client signature

Date