Client Type:	Level 1 (< 10 hrs.) Lower Complexity	Level 2 (10-19 hrs.) Moderate Complexity	Level 3 (>= 20 hrs.) Higher Complexity
Individual	$700	$900	$1,100
Couple	$900	$1,100	$1,300

A typical **Level 1** client has < 10 years in the workforce, and one or a combination of the following: 401(k) or similar, IRA/Roth IRA, taxable brokerage account.

A typical **Level 2** client may have one or more accounts listed in Level 1, > 10 years in the workforce, a pension, and/or an annuity.

A typical **Level 3** client may have one or more accounts listed in Level 1 and/or 2, > 20 years in the workforce, a small business, and/or equity compensation (RSU's, ESPP, NSO's, ISO's).