

Schedule of Fees

Superintendent and Education Executive Services

1. Review of contract, compensation and benefits and recommendations*: 1.00% of compensation
2. Analysis of new position vs. current position, including all tax, retirement and relocation costs/benefits*: 1.00% of compensation
3. Negotiation with Board, including re-running multiple financial analyses to obtain the best possible contract or settlement*: 1.00% of compensation
4. Plan documents to implement supplemental retirement plans under Internal Revenue Code Sections 401(a), 403(b), 457(b) and 457(f); includes all documentation to implement and maintain plan*: \$ 1,500 per plan
5. Financial Plan, including review of all current investments and applicable documentation (e.g., wills, trusts, insurance policies, etc.) and recommendations on structuring all personal financial matters to achieve stated goals*: \$ 1,750
6. Retirement Plan (same as financial plan but only reviewing retirement aspects of the person's "financial life")*: \$ 750
7. Management of investment portfolio*: 1.00% of annual assets

*Includes all analysis and consulting needed to design and implement these services. These fees do not include travel costs. Travel costs will be invoiced with receipts and will be payable in addition to the fees above. This fee does not include fees for the trustee, administrative services or mutual fund/investment charges of the investment manager or funds. The fees for contract review and plan documents are normally paid by the District or other employer.

Services under items 1,2, 3 and 4 are provided by Total Compensation Group Consulting LP. Services under items 5, 6 and 7 are provided by TCG Investment Advisory Services LP, a registered investment advisor.