
RELATIONSHIP SUMMARY

FORM CRS & FORM ADV PART 3: FOR USE BY A FP WHO IS A RR OF THE BD & WHO MAY ALSO BE AN IAR OF THE CORPORATE IA.

ITEM 1: INTRODUCTION

VERSION: 07.21.21

United PlanManSS

ITEM 3: FEES, COSTS, CONFLICTS AND STANDARD OF CONDUCT

What Fees & Costs Will I Pay?

This is a summary of the various fees & costs associated to the different products/service providers your FP may recommend depending on your needs.

IA Capacity

1. IA Custodian (TD Ameritrade Institutional, Schwab Advisor Services, ETRADE Advisor Services, Fidelity Institutional) These fees & costs include but are not limited to:
 - a. Transaction Fees (which can be transaction based or asset based): A transaction based transaction fee is a fixed cost to trade

a. Financial Planning Services