

On Target Wealth Partners is a Fee-Only Registered Investment Advisory Firm. A fee-only advisor is compensated solely by the client with neither the advisor nor any related party receiving compensation that is contingent on the purchase or sale of a financial product. Fee-only advisors may not receive commissions, rebates, awards, finder's fees, bonuses or other forms of compensation from others as a result of a client's implementation of the individual's planning recommendations.

We believe there is a serious conflict of interest if the advisor gains financially strictly from the incidental sale of a product. Most advisors refer to themselves as Fee-based or Fee-offset, meaning they charge both a fee and a commission.

More specifically, On Target Wealth Partners charges fees to clients based on Assets Under Management (AUM). Clients are billed quarterly in arrears. The fee is a sliding scale based on the amount of assets managed. Financial planning is typically a one-time plan fee, unless special analysis projects dictate ongoing changes.

Again, we receive no other compensation for OTWP services from any source other than client fees. We are proud of our fee structure for the level of service provided. We believe you will find our fee system very competitive. While OTWP clearly wants to be judged on approach, techniques, services, strategies, results, and numerous value quality factors, typically, OTWP will also provide comparative savings with its fee-only structure and passive investment philosophy.