	Response
Name of Firm	Financially In Tune, LLC
Contact info:	Philip Lee, CFP ® 607 North Avenue, No 18, 2nd Floor Wakefield MA 01880 781-587-0582 Philip@FinanciallyInTune.com
Website URL and/or NAPFA profile URL	http://www.financiallyintune.com/ NAPFA Profile: http://community.napfa.org/network/members/profile?UserKey=5a67ad11-fa32-497f-953e-ad3aa28296f5 In addition, I'm a Garrett Planning Network member https://www.garrettplanningnetwork.com/massachusetts/wakefield/member/philip-lee-cfp%C2%AE
How many employees?	Three (3)
Do you have account minimums?	No.
If you charge hourly fees, what is your standard rate?	$250/hour
If you charge AUM, how do you calculate fees?	Flat fee, based upon complexity and generally less than 1% of assets.
What is the range of AUM percentage fees?	.5% to 1%, based upon complexity and size of assets managed
What software do you use to prepare financial plans?	eMoney

Where do you meet clients? Your office, their home, Web meeting?	We meet in our office, by phone or Skype and occasionally at their homes.
Do you accept clients outside Massachusetts?	Yes. We have clients throughout the US and several overseas.
How long have you been a CFP® professional?	Since 2004.
Do you specialize? (divorce, retirement, seniors LGBTQ, etc	Not specifically, however, many of the clients with whom I work are widowed, retirees/looking to retire or young couple with high earnings/little assets.
Do you have any disciplinary history? Where can clients see it?	No disciplinary history.
Where is your office located?	607 North Avenue, No. 18 2nd Floor Wakefield MA 01880 (at Exit 39, Route 128, conveniently located about 2 miles north of Route 93/128 exchange)
What is the name of your Registered Investment Advisor?	Financially In Tune, LLC
What is the name of your Broker-Dealer, if applicable?	n/a We use Fidelity, Schwab and TIAA as custodians when managing assets.
Would you offer a free introductory call (for clients who have questions)?	Yes. In addition, we offer an hour in-person introductory meeting.