	Response
Name of Firm	Sound View Financial Advisors LLC
Contact info:	Susan Brown, CFA, CFP®
Website URL and/or NAPFA profile URL	www.soundviewfin.com
How many employees?	2
Do you have account minimums?	About $150,000
If you charge hourly fees, what is your standard rate?	I charge project fees. A full plan costs about $2,000.
If you charge AUM, how do you calculate fees?	0.7% up to $1 million 0.5% over $1 million
What is the range of AUM percentage fees?	0.5% to 0.7%.
What software do you use to prepare financial plans?	Moneytree
Where do you meet clients? Your office, their home, Web meeting?	All three, but primarily in my office.
Do you accept clients outside Massachusetts?	Yes
How long have you been a CFP® professional?	Since 2005
Do you specialize? (divorce, retirement, seniors LGBTQ, etc	No, but our clients are primarily middle class, as opposed to upper middle class.
Do you have any disciplinary history? Where can clients see it?	No. My ADV is available at www.adviserinfo.sec.gov.
Where is your office located?	Walpole, MA
What is the name of your Registered Investment Advisor?	Sound View Financial Advisors
What is the name of your Broker-Dealer, if applicable?	My custodian is Shareholders Service Group.
Would you offer a free introductory call (for clients who have questions)?	Yes