

ALENA Wealth, LLC

Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”) for more details of ALENA Wealth, LLC’s advisory services and fees, respectively. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees are not negotiable. A complete explanation of fees and services can be found in ALENA Wealth, LLC’s Form ADV Part 2A.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Services
Assets Under Management Fee	0	n/a	n/a
Hourly Fee	\$500	Hourly	Financial Planning
Subscription Fee	0	n/a	n/a
Fixed Fee	\$2,500-\$20,000	50% upfront and remainder upon project completion	Financial planning
Commissions to the Adviser	0	n/a	n/a
Performance-based Fee	0	n/a	n/a
Other	\$200-\$250	Hourly	Administrative services
Fees Charged by Third Parties	Fee Amount	Frequency Fee is Charged	Services
Third Party Money Manager	0	n/a	n/a
Robo-Adviser Fee	0	n/a	n/a
Fee Total	Talk with your Adviser about fees and costs applicable to you		

Additional fees and costs to discuss with your Adviser

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	LPL Financial
Commissions	Yes	LPL Financial/IARs*
Custodian Fees	Yes	LPL Financial
Mark-ups	Yes	LPL Financial
Mutual Fund/ETF Fees and Expenses	Yes	LPL Financial/IARs*

*Investment Adviser Representatives

Effective 1/5/2023