



### Table of Fees for Services

Carefully read Item 4 and Item 5 of Form ADV Part 2A (“Brochure”), as these sections of the Brochure contain important details about Lyon Financial Planning’s advisory services and fees. Fees may be negotiable. The fees below will only apply to you when you request the services listed. Fees may not be applicable to all clients.

Fees Charged by Investment Adviser	Fee Amount		Frequency Fee is Charged	Services
Assets under management fee	\$0		n/a	n/a
Hourly charges	\$500		Hourly, as needed	Financial planning services
Subscription fees (for newsletter)	\$0		n/a	n/a
Fixed fees	One-time Plan Ongoing Planning	\$8,000 - \$10,000 \$500 - \$800	Half upfront & half in arrears Monthly in arrears	Financial planning services
Commissions paid to the adviser	\$0		n/a	n/a
Performance based fees	\$0		n/a	n/a
Other	\$0		n/a	n/a
Fees Charged by Third Parties	Fee Amount		Frequency Fee is Charged	Services
Third party money manager fee	\$0		n/a	n/a
Robo-adviser fee	\$0		n/a	n/a
Other (if needed)	\$0		n/a	n/a
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	Broker
Commissions	Yes	Broker
Custodian Fees	Yes	Custodian
Mark-ups	Yes	Broker
Mutual Fund/ETF Fees and Expenses	Yes	Mutual Fund Company

Effective January 1, 2024