

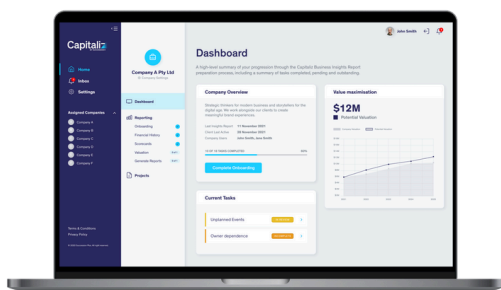
Capitaliz PRICING GUIDE

**92% of Capitaliz
advisors**

add multiple, billable
engagements in the **first six
months**.

\$5,000 - \$8,000
are the average advisor fees
collected per month.

STRATEGIC SOLUTIONS TO SCALE YOUR SERVICES



ENGAGEMENT TOOLS

for attracting + winning clients

- Unlimited access to the **Value Gap Assessment**
 - New **marketing and prospecting** tool for advisors
- Capitaliz Academy Access + Customized Onboarding
- Collaboration forums, quarterly insights marketing support + more!

STRATEGIC PLANNING

for managing plans + retaining clients

- Business Insights Report
- Dynamic Revaluation
- Project Management Platform
 - Implementation roadmaps, action item panel, checklists + more!

**Our pricing plans reflect our confidence in your ability to
grow your practice with Capitaliz.**

STANDARD PLAN

- Unlimited access to Engagement tools
- Strategic Planning tools included for **one client***
- Requires one year commitment

Two ways to pay:

● **\$5000/year**
billed annually
Cost savings of **\$1,000**
with one-time payment

● **\$500/month**
billed monthly

*Fee of **\$350/mo** per client for each
additional client profile

SCALED PLANS

*Cost per engagement is reduced as you reach
milestones with your book of business.*

5

\$1,500/month

*Engagement Tools
and Strategic
Planning for 5
simultaneous clients.*

*\$300 per month/
per client = **\$1,500**
six month savings*

10

\$2,750/month

*Engagement Tools
and Strategic
Planning for 10
simultaneous clients.*

*\$275 per month/
per client = **\$4,500**
six month savings*

20

\$5,000/month

*Engagement Tools
and Strategic
Planning for 20
simultaneous clients.*

*\$250 per month/
per client = **\$12,000**
six month savings*

CONTACT

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www.capitaliz.com/get-started