



Want to start or grow your own Fee-Only practice?

Here's how our process works.



Our Membership Options

Garrett Membership	Standard	Established Firm
Initial fee	\$2500	\$210
Monthly fee (month 2+)	\$550	\$210
Longstanding collaborative community of peers	✓	✓
Software/product/service provider discounts	✓	✓
CFP® and NAPFA continuing education (CE) webinars	✓	✓
GarrettPlanningNetwork.com Find an Advisor profile	✓	✓
Full access to our Knowledge Bank	✓	✓
Practice management, marketing, compliance, technology and coaching	✓	✓
Access to 5 CFP® staff coaches and consultants	✓	✓
Press and media requests	✓	✓
Annual Garrett Retreat professional conference	✓	✓
Quick Start Checklist	✓	✓
New member web-based training and templates		✓
New member 3-day live training workshop	✓	Optional - \$650
New member mentor program	✓	
TwentyOverTen website design, setup, hosting and archiving	✓	
G Suite configuration for email, doc. storage & compliance	✓	
Wealthbox CRM software	✓	
Initial RIA registration for hourly-based firm	✓	
ADV annual update for hourly-based firm	✓	
Markel E&O insurance for hourly-based firm	✓	

Our Membership Options

Standard Plan

This plan is ideal for someone who's just starting out. We can provide everything you need – from compliance necessities to marketing to day-to-day operational must-haves - to start a rewarding financial planning business from scratch.

This full package includes registration, conference and compliance fees; CFP® and NAPFA continuing education; coaching; webinars; practice management software; marketing essentials like a professional website design, and much more.

Monthly Payment (month 2 +): \$550

Receive a 5% discount when you pay your fee as an annual lump sum.

Initial Payment: \$2500



Established Firm Plan

This plan is for someone who's already a Registered Investment Advisor who runs a fee-only firm and provides everything you need to grow and maintain your business.

You'll gain access to our esteemed and active network of advisors; CFP® and NAPFA continuing education; our extensive Knowledge Bank resources and templates and various industry-related discounts. You'll also receive admission to our annual conference and may attend all webinars, on everything from practice management to marketing; technology; and compliance.

You'll also have our full-time topic-specific coaches at your disposal.

Monthly Payment (month 2 +): \$210

Receive a 5% discount when you pay your fee as an annual lump sum.

Initial Payment: \$210



Firm Associate Plan

This plan is for an existing member who wants to add an associate or staff member to the Garrett Planning Network.

Your staff member or associate will receive access to our community, our Knowledge Bank resources and document templates; various industry-related discounts; CFP® and NAPFA continuing education and our webinars covering everything from practice management to marketing, technology and compliance.

Monthly Payment (month 2 +): \$50

Receive a 5% discount when you pay your fee as an annual lump sum.

Initial Payment: \$50



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Become a Member Today