FinSeminarIQ™

Pricing & Engagement Model

Turn Retirement Dinner Attendees Into Clients

Prepared by Axon Tech Labs

axontechlabs.com

2026

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How it Works

FinSeminarIQ is deployed into your own AWS account. You own the infrastructure, you own the data, and you own the dashboards — permanently. There is no shared platform, no vendor database, and no lock-in.

The engagement has three components: a one-time setup fee, a monthly platform license, and an optional support retainer.

One-Time Setup Fee

Deployment	Fee
Standard (up to 6 offices)	$45,000-$60,000
Enterprise (custom domain, SLA, white-glove training)	$65,000-$85,000

The setup fee covers:

- Network infrastructure, security groups, and VPC configuration
- Database provisioning and schema initialization
- All application components deployed and configured
- QuickSight analytics — nine dashboards, Amazon Q topic, row-level security
- Venue database preloaded for your office regions
- End-to-end verification and staff handoff

Paid at contract signing, before deployment begins.

Monthly Platform License

The platform license covers access to the FinSeminarIQ intellectual property — the scoring engine, planning cluster logic, risk profiling, suppression engine, campaign radius calculation, and all future updates.

Tier	Monthly	Included Offices
Starter	$1,500	Up to 3 offices
Professional	$2,500	Up to 6 offices
Enterprise	$4,000	Up to 12 offices

Additional offices beyond the included count: $200–$300 per office per month.

Support Retainer

The support retainer covers ongoing platform maintenance, monitoring, and incident response.

Tier	Monthly	Included Hours
Basic	$1,500	8 hours
Standard	$2,500	15 hours
Premium	$4,000	25 hours

The support retainer is optional. Firms that prefer on-demand support are billed at $150–$200/hour with no monthly commitment. A monthly retainer is available for firms that prefer predictable costs and guaranteed response times.

Included in the support retainer:

- Proactive monitoring of all pipeline and application components
- Incident response within agreed SLA window
- Minor configuration changes and user management
- Security patch deployments
- QuickSight dataset refresh support

Additional Services

The following services are billed separately at $150–$200/hour:

- New office onboarding after go-live ($1,500–$2,000 flat fee per office)
- New dashboard development or major visual changes
- Redshift schema changes
- New data provider mapping profile setup
- Staff training sessions
- Emergency after-hours response

AWS Infrastructure

AWS infrastructure costs are passed through at cost with no markup. The client pays AWS directly — there is no intermediary billing.

For a 6-office deployment, AWS infrastructure runs approximately:

Scenario	Monthly AWS Cost
Standard analytics (no Amazon Q)	~$464/month
Full analytics (Reader Pro + Amazon Q)	$1,226/month

The difference between the two scenarios is the QuickSight analytics tier — specifically whether advisors have access to Amazon Q generative AI features inside the dashboards.

Total Monthly Cost — 6-Office Deployment

Item	Monthly
Platform license (Professional)	$2,500
Support retainer (Standard)	$2,500
AWS infrastructure (pass-through)	~$464-$1,226
Total	**~$5,464-$6,226/month**

AWS infrastructure is paid directly to AWS by the client with no markup.

The ROI Case

A single dinner seminar campaign costs $17,000–$36,500 to run. One new client from that campaign generates approximately $60,000 in lifetime advisory fees.

The platform pays for itself if it helps close one additional client per year across all offices. That is the only number that matters.

FinSeminarIQ gives every advisor a structured, self-reported profile of every prospect who walked in the door — planning needs, risk tolerance, consultation intent, wealth tier — before the first follow-up call. The follow-up is no longer a cold call. It is a targeted conversation that starts exactly where the prospect said they are.

New Office Onboarding

When your firm opens a new office or expands to a new market after the initial deployment, onboarding that office is a flat fee of $1,500–$2,000 per office.

This covers office and venue setup, prospect pool import, first campaign configuration, QuickSight access provisioning, and verification.

Summary

Item	Cost
Setup fee – Standard	$45,000-$60,000
Setup fee – Enterprise	$65,000-$85,000
Platform license – Starter (up to 3 offices)	$1,500/month
Platform license – Professional (up to 6 offices)	$2,500/month
Platform license – Enterprise (up to 12 offices)	$4,000/month
Support retainer – Basic (8 hours)	$1,500/month
Support retainer – Standard (15 hours)	$2,500/month
Support retainer – Premium (25 hours)	$4,000/month
New office onboarding	$1,500-$2,000/office
AWS infrastructure	Pass-through the cost
Ad-hoc work outside retainer scope	$150-$200/hour

The platform pays for itself with one additional client per campaign. The setup fee pays for itself with two.

Introductory Pricing — Limited Availability

As part of our early adopter program, we are offering a significant discount on the one-time setup fee for a limited number of first deployments.

Contact us directly to discuss terms.