



Financial Planning Advice

Type of Advice

Strategy & Implementation

- | Type of Advice | Strategy & Implementation |
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| <ul style="list-style-type: none"> Issues based scaled advice for clients who have specifically identified needs. These could range from insurance needs to consolidating super accounts etc. | \$1,100 inc GST |
| <ul style="list-style-type: none"> Transition to Retirement | \$2,200 inc GST |
| <ul style="list-style-type: none"> Ongoing monthly cashflow monitoring (Prospera) | \$2,200 per annum (inc GST) |
| <ul style="list-style-type: none"> Strategic Planning Package for clients who have multiple needs, explore various strategies to consider and require a high level of coordination | \$5,500 inc GST |

The initial consultation is at our expense. This is our investment in assisting us to understand your needs. Subsequent consultations will be charged by agreement at an agreed rate. Other services we provide that are not covered by these arrangements, may be charged at an agreed rate prior to commencing the work.

** Any commissions from risk insurance will be used to offset the plan fee.*



Menu of Services

	Service Package	Active	Comprehensive
1	Portfolio and Strategy Review Meeting	✓ Annual	✓ Half-yearly
2	Risk Insurance Review	✓ Annual	✓ Annual
3	Access to Adviser	✓	✓
4	Research on Products and Investments	✓	✓
5	Quarterly Newsletters	✓	✓
6	Federal Budget Update	✓	✓
7	Invitation to attend a seminar	✓	✓
8	Web access to portfolio	✓	✓
9	Portfolio Value	Up to \$500,000	\$500,000 to \$1,000,000
10	Ongoing fees	0.77%	0.55%

* \$1,000,000 - \$2,000,000 0.44%

* \$2,000,000 plus 0.22%

For ad-hoc assistance beyond that offered under your chosen Service Package, the following additional services are available:

Service	Fee (including GST)
Strategy Paper	\$1,100.00
Centrelink Assistance	\$880.00
Adviser Consultation (per hour) - Divorce settlement - Financial hardship - Insurance claims <i>Minimum charge one hour</i>	\$440.00
Prospera Re-model	\$1,100.00