Ongoing Services Package Options

Just as no two plans are the same we understand not everyone's circumstances require the same level of ongoing services. To ensure you receive the appropriate level of ongoing advice we have designed our offers to cater for the level of service you choose to receive.

	Description	Financial Planning Clients with Ongoing Management		
		Do it myself	Do it with me	Do it for me
Core Services	Offer of an Annual Progress / Review meeting	✓	✓	✓
	Half Yearly Review offer		✓ (Phone)	✓
	Annual Check In	✓		
	Bi Annual Report		✓	✓
	Access to your Financial Adviser		✓	✓ (priority)
	Access to Admin Support Staff for assistance with general queries, switches, redemptions etc	✓	✓	✓ (priority)
Additional Services	Quarterly Newsletter (Electronic only)	✓	✓	✓
	Budget Update (Electronic only)	✓	✓	✓
	Concierge Service			✓
	Acting as a sounding board		✓	✓
	Assistance with Switches and Withdrawals of Investments	✓ (1 pa)	✓ (2 pa)	✓
	Budgeting and cashflow management	Additional $	✓	✓
	Centrelink Correspondence Nominee			✓
	Centrelink query and form assistance		✓	✓
	Insurance claims – assistance on claims implemented through our office	Additional $	Additional $	✓
	Work with your other trusted professional advisers	Additional $	Additional $	✓
	SMSF advice		✓	✓
	Wealth portal subscription	✓ (Starter account)	✓ (Pro account)	✓ (Pro account)
	Estate planning and family succession planning	Additional $	✓	✓
	General advice for children under 25			✓
	Additional Advice	2 x ROA	4 x ROA & 1 x SOA	✓ ROA & 2 x SOA
Fees	**Ongoing Advice Fees**	**From $1,320 pa**	**From $4,400 pa**	**From $8,800 pa**
	All commissions rebated			✓
Service	Service Standard	5 business days	48 hours	Same day – 24hrs
	Phone Calls & Email Queries	Administration	Adviser if required	Adviser
	Review Follow Ups	N/A	Phone call & Email	Phone call & Email