

Statement of Advice Preparation Service

YOUR INVESTMENT (INCL GST)

<u>BASIC</u>	A Basic SoA including a single strategy such as: <ul style="list-style-type: none"> • A single lump sum investment into a superannuation or investment product; or • A savings plan with simple projections and basic insurance recommendations; or • Risk only. 	\$330
<u>STANDARD</u>	A Standard SoA including 2-3 strategies such as: <ul style="list-style-type: none"> • Lump sum and instalment gearing recommendations; or • Retirement income strategies including establishing account-based pensions; or • Per Basic SoA plus analysis of the client's existing or proposed Centrelink entitlement; or • Superannuation rollover with risk. 	\$440
<u>COMPREHENSIVE</u>	A Comprehensive SoA including 3-4 strategies such as: <ul style="list-style-type: none"> • Retirement income SoA involving pre/post-retirement planning, pensions and Centrelink; or • Superannuation rollover with salary sacrifice, investment planning and personal insurance; or • Redundancy planning. 	\$550
<u>COMPLEX</u>	A Complex SoA involving complicated investment strategies such as: <ul style="list-style-type: none"> • Multiple entities or tax structures; • Creation of a Self Managed Superannuation Fund; • Self Managed Superannuation Fund conversion to pension phase; • Multiple scenarios, options, comparisons; • Centrelink strategies involving compensation payouts and estate planning issues. 	Priced on Application

Strategy Paper

Priced on Application

This Service includes research reports incorporating strategy analysis, anticipated outcomes, financial projections and comparative financial modelling, which will assist in your final strategy.

Standard completion time is 5-7 business days > A late fee of \$50 applies for late payments > Discounts can be applied based on regularity and volume of work

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Fees current from May 2017. Prices subject to change.