

Service Menu

Advisers

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◆ SMSF - Set up

Registrations, Establishment, Trusteed, ASIC fees for Corporate

Fees (excl. GST)

<u>Establishment only</u> (1 account).	Individual/Joint	\$ 1, 500
	Corporate Trustee (includes ABN, ASIC fee)	\$ 2, 500

<u>Add-Ons</u> (Execution only).	Investment Strategy (includes rollovers)	Add	\$ 500
	Pension (includes commencement)	Add	\$ 1, 000
	Borrowing (includes property)	Add	\$ 1, 500

<u>Advice</u>	Statement of Advice	See section below
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◆ Financial Planning Advice

Superannuation strategies (eg. TTR, Salary Sacrifice), Pension, Insurance (Personal and Business), Investment (Portfolios), Investment Gearing, Debt Management, Cash Flow

<u>1 Entity</u>	Advice for 2 strategies or less	2	\$ 1, 500
	Advice for 4 strategies or less	4	\$ 3, 000

<u>Combined Entity Advice</u>	1 additional entity, 2 strategies or less	Add	\$ 1, 000
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◆ Investment Advice

Fact Find, Risk Profiling, Rebalancing/Switch/Advice, IPO/Placements, Portfolio Establishment/Review

<u>All accounts</u>	1 entity	1	\$1, 500
<u>Combined entities</u>	any 2 entities	2	\$2, 000
	additional entity	Add	\$ 500