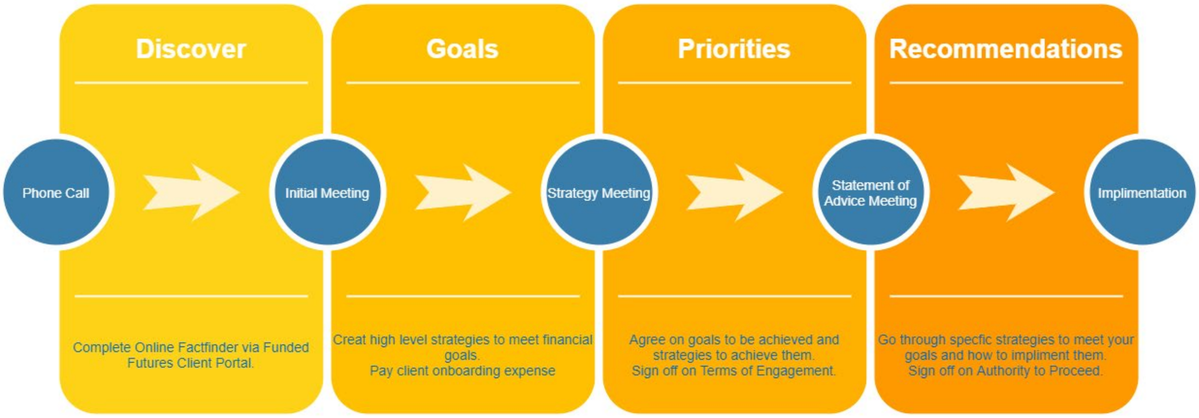
Funded Futures Financial Services
ABN: 81 646 656 804
3/22-24 Strathwyn Street
BRENDALE 4500 QLD
1300 003 337
ContactUs@FundedFutures.com.au
Www.FundedFutures.com.au

Advice Process and Fee Schedule



Discover: After our initial phone call you will be invited into the Funded Futures client portal, from there you complete your personal and financial details as well as setting some goals.

Once this is completed you will be contacted to book your Initial Meeting.

Goals: In your initial meeting we will work to refine your goals while discussing your current situation, and what strategies we can use to accomplish your goals.

To progress to the Strategy Meeting you will need to pay a client onboarding expense.

Priorities: This is where we look at your goals and the strategies in detail and prioritise which ones you want to achieve so we can optimise the financial strategies to meet your needs.

To progress to the Statement of Advice Meeting you will need to sign off on the Terms of Engagement. *The Terms of Engagement is a document outlining the areas of advice you will be receiving and their associated costs.*

Recommendations: We go through the specific strategies and timeframes to meet your goals, the alternatives considered and projections of your future wealth expectations.

You then sign off on the Authority to Proceed and we start implementing your financial advice strategy.

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Initial advice and implementation costs:

Client Onboarding : $550—$770

Budget	Superannuation	Retirement Planning	Investment	Personal Insurance
Analysis of your cashflow & budget Debt reduction strategy	Lost Super Search Super Research Contribution Strategy Investment Strategy	Retirement Aims Analysis Centrelink application assistance (where applicable) Investment Strategy Retirement Income Stream comparison and Recommendation	Wealth creation strategy Investment research Entity discussion	Insurance Needs Analysis Comparison to your current Insurance Recommendations of new Insurance
$750	**$3,800—$5,200**	**$4,500—$7,500**	**$3,500—$6,600**	**Insurance Commission/ Fee for Service from $2,400**
Via Invoice	Via Super (Where allowed by Superfund provider)	Partial payment via Invoice, remainder via Super (where applicable)	Via Invoice, Product or Entity where applicable.	Via Product Provider for commissions Via Invoice for Fee for Service

Other Services Available:

Insurance Claim: $3,300 + 2.2% of Claim Value

Administration Functions: $175

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Annual services: (billed in monthly instalments, including GST)

Cashflow and Budgeting

- Access to Budgeting and Cashflow App
- Assistance in Account setup
- Goal setting
- Debt reduction strategy (where required)
- Monthly Newsletter

$1,250p.a

Basic

- Cashflow and Budgeting
- Annual formal review of Advice
  - 1 Advice Service
- Personal Insurance Advice (if paid via commissions)
- 1 Client requested review

Single: $2,440p.a

Couple: $3,800p.a

Superior

- Cashflow and Budgeting
- Annual formal review of Advice
  - 2 Advice Services
- 6 Month Portfolio Review
- Personal Insurance Advice (if paid via commissions)
- 1 Client requested reviews
- Centrelink Services

Single: $3,600p.a

Couple: $4,800p.a

Ultimate

- Cashflow and Budgeting
- Annual formal review of Advice
  - 3 Advice Services
  - Personal Insurance Advice
- 6 Month Portfolio Review
- 2 Client requested Reviews
- Centrelink Services
- SMSF Advice

Single: $4,400p.a

Couple: $6,600p.a

Advice Services: Superannuation, Retirement Income Streams, Investment*, Personal Insurance

*Multiple Investments will be additional advice services (ie, Rental Property, Share Portfolio etc)