

Schedule of fees

Initial Fees:

SCOPE <i>Service Areas:</i>	DETAILS <i>Includes:</i>	REMUNERATION <i>Fee and/or Commissions:</i>	PAYMENT METHOD
Superannuation advice	-Lost Super Search -Super Research -Contribution Strategy - Super Recommendation via SOA -Implementation	\$2800-\$4200	Via Super (Where allowed by Superfund provider)
Retirement Planning	-Retirement Aims Analysis -Centrelink application assistance (where applicable) -Retirement income stream recommendations via SOA -Implementation	\$3300-\$5500	Partial payment via Direct Debit or Credit, remainder via Super (where applicable)
Investment advice	-Wealth creation strategy -Investment research -Entity discussion -Investment and Wealth creation recommendations via SOA -Implementation	\$2200-\$4400*	Via Direct Debt or Credit card. Via Product or Entity where applicable.
Insurance advice	-Insurance Needs Analysis -Comparison to your current insurance -Product Provider recommendation via SOA -Implementation	Insurance Commission - As set out in our Financial Services Guide	Via Product Provider
Cashflow & Budgeting advice	-Analysis of your cashflow & budget -Debt reduction strategy	\$550	Via Direct Debit or Credit Card
Insurance claims management	-Full management of your lump sum insurance policy claim	\$3300 + 2.2% of the sum insured	\$3300 from insurer* and gap from your claim proceeds (* if insurer pays a financial planning benefit)
Aged care assistance	-Interaction with Centrelink to assist with transition to accommodation -Centrelink assistance for pension-based enquiries	\$220 per hour, billed in hourly blocks.	Via direct debit or credit card
Estate Planning	-Discuss asset position and beneficiaries -Discuss tax implications of inheritance -Have solicitor create Will on your behalf	\$990 - \$3,900	Via direct debit or credit card
Administrative functions	-Provision of financial documents to your accountant or lawyer for tax/estate planning purposes -Other as required	\$175 per request	From entity with beneficial ownership



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Ongoing service fees: (billed in monthly instalments)

SCOPE Service Areas:	DETAILS Includes:	REMUNERATION Fee and/or Commissions:	PAYMENT METHOD
Superannuation advice	-Maintain contribution strategy -Maintain investment strategy -Ensure you remain up to date with relevant legislation	\$1,200-\$2,600p.a	Via Super (Where allowed by Superfund provider)
Retirement Planning	-Retirement Aims Analysis -Continued Centrelink assistance -Maintain investment strategy -Ensure you remain up to date with relevant legislation	\$2,500-\$3,500p.a	Partial payment via Direct Debit or Credit, remainder via Super (where applicable)
Investment advice	-Maintain contribution strategy -Maintain investment strategy -provide wealth projections	\$1,200-\$4400p.a*	Via Direct Debt or Credit card. Via Product or Entity where applicable.
Insurance advice	-Review insurance needs -Review product competitiveness	Insurance Commission - As set out in our Financial Services Guide	Via Product Provider
Cashflow & Budgeting advice	-Access to budgeting tools -Continued coaching towards savings goals	\$550p.a	Via Direct Debit or Credit Card

**Additional fees may be applicable for investments over \$500,000.*