INVESTWISELY
THE ONLY WAY TO INVEST

Fee Schedule

September 2022

Shop 7, Circa Retail
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Bella Vista, NSW 2153

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CREATE

- Wealth Building
- Budgeting and cashflow
- Debt structuring

Initial Minimum Fee: $1,500

Minimum Ongoing fee: $1,500 p.a.
Asset based fee: 0.90% p.a.

All prices include GST

OUTCOMES:

- Review of current position
- Establish current & future goals
- Create a savings plan
- Debt structuring/consolidation
- Review of superannuation
- Review of insurance
- Review of tax position
- Investment Recommendations
- Statement of Advice

ONGOING SERVICE
Annual review of:

- Goal Tracking
- Discuss any recent changes to your circumstances and regulations
- Discuss and review your risk profile
- Tax & Estate planning review
- Discuss future strategy changes
- Discuss future investment opportunities
- Fine Tuning and Rebalancing of your plan
- Written follow up provided

ENHANCE

- Superannuation Advice
- Investment Advice
- Insurance Recommendations

Initial Minimum Fee: $3,500

Minimum Ongoing Fee: $3,000 p.a.
Asset based fee: 0.90% p.a.

All prices include GST

OUTCOMES:

- ‘CREATE’ level services

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- Detailed budgeting & cashflow analysis
- Bespoke superannuation management
- Investment Recommendations
- Social Security considerations
- Modelling as Required (up to 2 scenarios)
- Estate Planning recommendations
- Statement of Advice

ONGOING SERVICE
Bi-Annual review of:

- Goal Tracking
- Discuss any recent changes to your circumstances and regulations
- Discuss and review your risk profile
- Tax & Estate planning review
- Discuss future strategy changes
- Discuss future investment opportunities
- Fine Tuning and Rebalancing of your plan
- Written follow up provided

PREMIUM

- Complex advice
- SMSF Advice
- Aged Care Advice

Initial Minimum Fee: $5,000

Minimum Ongoing Fee: $5,000 p.a.
Asset based fee: 0.90% p.a. Or by negotiation for asset balance over $1,000,000

All prices include GST

OUTCOMES:

- ‘ENHANCE’ level services

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- Sophisticated investment strategies
- Complex tax-effective strategies
- Asset Protection Advice
- Intergenerational Estate Planning
- Modelling as Required (up to 5 scenarios)
- Trust structures and recommendations
- Statement of Advice

ONGOING SERVICE
Bi-Annual review of:

- Goal Tracking
- Discuss any recent changes to your circumstances and regulations
- Discuss and review your risk profile
- Tax & Estate planning review
- Discuss future strategy changes
- Discuss future investment opportunities
- Fine Tuning and Rebalancing of your plan
- Detailed review of investment returns against benchmark
- Written follow up provided

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