



## Schedule of Fees

Simple Statements of Advice \$330 (Incl GST)

Complex Statements of Advice \$385 (Incl GST)

Statements of Advice (Multiple Entities) \$495 (Incl GST)

- Eg. Both members of couple receiving advice
- Eg. An individual and SMSF / Trust receiving advice
- Any advice topics

Record of Advice \$165 (Incl GST)

### **Simple Advice Topic examples:**

- Investment options
- Super Contributions
- Reviewing payments from income streams
- Estate Planning
- Projections

### **Complex Advice Topic examples:**

- Transition to Retirement strategies
- Super Consolidation
- Insurance
- Investments outside of superannuation
- Comparison of Investments
- Retirement strategies
- Aged Care
- Centrelink

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