



**PRICES BELOW INCLUDE GST**

Levels			
<b>ROA</b>	Simple	\$110	
	Standard	\$220	
	Complex	\$330	
<b>Limited</b>	Insurance Only SOA	\$330	<i>Advice for insurance only with a maximum of 8 separate policies (combined)</i>
	Business Insurance SOA		<i>Advice for business insurance only with a maximum of 10 separate policies (combined)</i>
	Investment Switch SOA		<i>Includes investment switches for up to 4 platforms</i>
	Investment Only SOA		<i>Simple investment SOA with no other recommendations</i>
	Super Rollover Only SOA (Max 2 Funds)		<i>Simple rollover SOA with no other recommendations</i>
<b>Simple</b>	Insurance (SMSF) Only SOA	\$440	<i>Insurance SOA with cover being held in SMSF (maximum of 10 policies)</i>
	SMSF Investment SOA		<i>Advice for the trustees only</i>
<b>Standard</b>	Super and Insurance SOA	\$495	<i>Maximum of 4 super rollovers (combined) and 10 insurance policies (combined)</i>
	Retirement Planning SOA		<i>Includes a retirement analysis and maximum fo 4 pension accounts (combined)</i>
	Aged Care SOA (1 Scenario)		<i>Aged Care SOA with specific recommendations. Additional scenarios - refer to Add-Ons</i>
<b>Complex</b>	SMSF Establishment SOA	\$660	<i>Establishing an SMSF and making investment recommendations</i>
	SMSF and Insurance SOA	\$770	<i>Super and Investment advice with a SMSF, including insurance recommendations</i>
	SMSF LRBA SOA	\$880	<i>Includes insurance and additional modelling requirements</i>
	Gearing, Investment and Insurance SOA	\$770	<i>Does not include insurance advice, but includes additional modelling requirements</i>

Add-Ons	
Express Case (2 days off turnaround - Normally 3 days)	130%
Express Case (3 days off turnaround - Normally 5 days)	150%
Premium Service (Limited)	\$300
Trainee Discount (Limited)	30%
Budgeting Advice	\$55
Debt Management Advice	\$55
Retirement Analysis	\$55
Centrelink Advice	\$55
Investment Switch Advice	\$55
Salary Packaging Advice	\$55
Lifestyle Goals Advice	\$55
Flow-Charts (Non-Standard)	\$55
Additional Modelling and Scenarios	\$110
Guarantee Products	\$110
Over 4 Super/Pension Funds (combined)	\$55
SMSF: Investment Strategy	\$55
SMSF: Review Trust Deed and Trustee Structure	\$55
Recontribution	\$55
TTR	\$55
Excess underlying investments (16 or more)	\$55
Excess insurance (9 or more)	\$55
Strategy Paper	On quote
Hourly Rate	\$110