



### Interprac Financial Planning Pty Ltd

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### C & R Financial Management Pty Ltd

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Part of the Concepts & Results Group  
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# Annual Service Agreement Packages

## 1<sup>st</sup> July 2022 to 30<sup>th</sup> June 2023

*Packages that help you get traction and keep you moving along your financial journey.*

Service Features		Bronze Package
		\$660.00
Review session Includes the following online services		
<ul style="list-style-type: none"> <li>5 Minute Health Check</li> <li>Identification of any Significant Changes</li> <li>Review &amp; Update of Your Current and Future Goals</li> <li>Review &amp; Update of Your Income Plan</li> <li>Review &amp; Update of Your Investment Plan</li> <li>Review &amp; Update of Your Debt Plan</li> <li>Review &amp; Update of Your Insurance and Risk Plan</li> <li>Review &amp; Update of Your Superannuation &amp; Retirement Plan</li> <li>Review &amp; Update of Your Estate Plan (Wills, EPOA's &amp; Testamentary trusts)</li> <li>Access to Astute Wheel Scenarios &amp; Calculations</li> <li>Summary of Possible Opportunities to be Considered</li> <li>Access to Video Recording of Session</li> <li>Talking Concepts Newsletter</li> </ul>		

## Pricing and Discounts

### Advice Fees (Based on Scope of Works)

2 <sup>nd</sup> Catch Up Appointment to be held during the Financial Year	\$440.00
Record of Advice Fees	\$550.00
Statement of Advice Fees	To be scoped and priced

### Buy/Sell Brokerage Fees and Managed Funds Entry and Exit Fees For Transactions

• Less than \$50,000	2.50%
• \$50,001 - \$100,000	2.00%
• \$100,001 - \$150,000	1.75%
• \$150,001 - \$300,000	1.50%
• \$300,000 plus	1.25%

### Implementation Fees that may be incurred

Off Market Share Transfer (incl share registry charge) multiple transfers quoted	\$110.00
Administration on Investments - providing information to external third parties (accountant, mortgage broker, etc.)	\$99.00 per hour
Administration on Investments -change of address, change of ownership, change of dividend nominations etc	\$99.00 per hour
Additional Minutes for SMSF as required eg lump sum withdrawal	\$165.00 per set of minutes
Term deposits/high interest cash accounts – including research & applications	\$110.00 per application
Research & Rollover of Super - includes Record of Advice and all Implementation	\$220.00 per rollover
Initial Pension Documentation	\$660.00 per pension
Annual Pension Documentation	\$220.00 per pension

*\* All prices are inclusive of GST*