



Interprac Financial Planning Pty Ltd

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C & R Financial Management Pty Ltd

A BN 96 006 651 010
Part of the Concepts & Results Group
Corporate Representative No: 235513
612 Warrigal Road, Malvern East VIC 3145
PO Box 61, Holmesglen VIC 3148
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Annual Service Agreement Packages

1st July 2022 to 30th June 2023

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

Service Features		Gold Package
		\$2,895.00
Review session includes the following online services twice a year		
<ul style="list-style-type: none"> • 5 Minute Health Check • Identification of any Significant Changes • Review & Update of Your Current and Future Goals • Review & Update of Your Income Plan • Review & Update of Your Investment Plan • Review & Update of Your Debt Plan • Review & Update of Your Insurance and Risk Plan • Review & Update of Your Superannuation & Retirement Plan • Review & Update of Your Estate Plan (Wills, EPOA's & Testamentary trusts) • Access to Astute Wheel Scenarios & Calculations • Summary of Possible Opportunities to be Considered • Access to Video Recording of Session • Unlimited Phone Calls • Talking Concepts Newsletter • Direct Link to Interest Rate Yields • Direct Link to Market Commentary Video 		

Reports:	
• 5 Minute Health Report	One per Year
• Goals Report	One per Year
• Core Logic Property Valuations	One per Year
• Investment Portfolio Valuations	One per Year

Pricing and Discounts	Gold Package Exclusive Discounts
Advice Fees (Based on Scope of Works)	
2 nd Catch Up Appointment to be held during the Financial Year	FREE (normally \$440)
Record of Advice Fees	40% Off Silver Package fee of \$550.00
Statement of Advice Fees	40%
Buy/Sell Brokerage Fees and Managed Funds Entry and Exit Fees for Transactions	
Less than \$50,000 – 2.50%	40%
\$50,001 - \$100,000 – 2.00%	40%
\$100,001 - \$150,000 – 1.75%	40%
\$150,001 - \$300,000 – 1.50%	40%
\$300,000 plus – 1.25%	40%
In addition, as a Gold Client you will receive a 40% discount on the following services via our office	
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.

** You are also eligible for a 10% Discount for your Accounting Fees to be incurred by the subscribing entity when Accounting services are being completed by Concepts & Results Group.