



Interprac Financial Planning Pty Ltd

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C & R Financial Management Pty Ltd

A B N 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


Phone: 03 9569 5676

Email: fp@cr.com.au

Annual Service Agreement Packages

1st July 2025 to 30th June 2026

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

Service Features	
Bronze Package	
\$3,300.00	
Review session Includes the following online services	
<ul style="list-style-type: none"> Astute Wheel Data Management 	
<ul style="list-style-type: none"> *Access to Astute Wheel Vault Storage 	
<ul style="list-style-type: none"> 5 Minute Health Check 	
<ul style="list-style-type: none"> Identification of any Significant Changes 	
<ul style="list-style-type: none"> Review & Discuss Your Current and Future Goals 	
<ul style="list-style-type: none"> Review & Discuss Your Income Plan 	
<ul style="list-style-type: none"> Review & Discuss Your Investment Plan 	
<ul style="list-style-type: none"> Review & Discuss Your Debt Plan 	
<ul style="list-style-type: none"> Review & Discuss Your Insurance and Risk Plan 	
<ul style="list-style-type: none"> Review of Your Superannuation & Retirement Plan 	
<ul style="list-style-type: none"> Review & Discuss Your Estate Plan (Wills, EPOA's & Testamentary trusts) 	
<ul style="list-style-type: none"> Access to Astute Wheel Scenarios & Calculations 	
<ul style="list-style-type: none"> Summary of Possible Opportunities to be Considered 	
<ul style="list-style-type: none"> Agenda Notes to be Issued upon meeting, 	
<ul style="list-style-type: none"> Access to Video Recording of Session 	
<ul style="list-style-type: none"> *Invitation to the new Packaged Boardroom Sessions 	
<ul style="list-style-type: none"> *Exclusive invitation to new investment opportunities webinars 	
<ul style="list-style-type: none"> *Exclusive invitation to leading investment managers and industry guest speaker's webinars 	
<ul style="list-style-type: none"> Talking Concepts Newsletter 	

*(new services)

Pricing and Discounts

Advice Fees (Based on Scope of Works)

2 nd Catch Up Appointment to be held during the Financial Year	\$440.00
Record of Advice Fees	10% Off Bronze Package fee of \$550.00
Statement of Advice Fees	10%

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

• Less than \$50,000 – 2.50%	10%
• \$50,001 - \$100,000 – 2.00%	10%
• \$100,001 - \$150,000 – 1.75%	10%
• \$150,001 - \$300,000 – 1.50%	10%
• \$300,000 plus – 1.25%	10%

In addition, as a Bronze Client you will receive a 10% 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
Modelling (PM)	\$150.00
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*