



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 2025 to 30th June 2026

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

Service Features		Gold Package
		\$6,600.00
Review session Includes the following online services once per year		
<ul style="list-style-type: none"> • Astute Wheel Data Management • *Access to Astute Wheel Vault Storage • Identification of any Significant Changes • Review & Discuss Your Current and Future Goals • Review & Discuss Your Income Plan • Review & Discuss Your Investment Plan • Review & Discuss Your Debt Plan 	<ul style="list-style-type: none"> • *Invitation To the new Packaged Boardroom • *Exclusive invitation to new investment • *Exclusive invitation to leading investment • Talking Concepts Newsletter 	
<ul style="list-style-type: none"> • Review & Discuss Your Insurance and Risk Plan • Review & Discuss Your Superannuation & Retirement Plan • Review & Discuss Your Estate Plan (Wills, EPOA's & Testamentary trusts) • Access to Astute Wheel Scenarios & Calculations • Summary of Possible Opportunities to be Considered • Agenda Notes to be Issued upon meeting, • Access to Video Recording of Session • Unlimited Phone Calls 		

*(new services)

Reports:	
• 5 Minute Health Report	3 Times per Year
• Goals Report	3 Times per Year
• Core Logic Property Valuations	3 Time per Year
• Investment Portfolio Valuations	3 Times per Year

Pricing and Discounts	Gold Package Exclusive Discounts
Advice Fees (Based on Scope of Works)	
Record of Advice Fees	50% Off Package fee of \$550.00
Statement of Advice Fees	50%
Buy/Sell Brokerage Fees and Managed Funds Entry and Exit Fees for Transactions	
Less than \$50,000 – 2.50%	50%
\$50,001 - \$100,000 – 2.00%	50%
\$100,001 - \$150,000 – 1.75%	50%
\$150,001 - \$300,000 – 1.50%	50%
\$300,000 plus – 1.25%	50%
In addition, as a Gold Client you will receive a 50% 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
Modelling (PM)	\$150.00
Additional Minutes for SMSF as required e.g. 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.