

**Interprac Financial Planning Pty Ltd**

A B N 14 076 093 680

Australian Financial Services License 246638

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Phone: 03 9209 9777 Fax: 03 9209 9731

**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		Silver Package
		\$4,400.00
Review session Includes the following online services once per year		
• Astute Wheel Data Management	• *Invitation To the new Packaged Boardroom	
• *Access to Astute Wheel Vault Storage	• *Exclusive invitation to new investment	
• Identification of any Significant Changes	• *Exclusive invitation to leading investment	
• Review & Discuss Your Current and Future Goals	• Talking Concepts Newsletter	
• Review & Discuss Your Income Plan		
• Review & Discuss Your Investment Plan		
• Review & Discuss Your Debt Plan		
• 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		

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

Pricing and Discounts	Silver 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	25% Off Silver Package fee of \$550.00
Statement of Advice Fees	25%
Buy/Sell Brokerage Fees and Managed Funds Entry and Exit Fees for Transactions	
Less than \$50,000 – 2.50%	25%
\$50,001 - \$100,000 – 2.00%	25%
\$100,001 - \$150,000 – 1.75%	25%
\$150,001 - \$300,000 – 1.50%	25%
\$300,000 plus – 1.25%	25%
In addition, as a Silver Client you will receive a 25% 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 5% Discount for your Accounting Fees to be incurred by the subscribing entity when Accounting services are being completed by Concepts & Results Group.**