



Initial Advice Packages

Initial Advice Services

Service	Silver	Gold
Discovery Meeting	✓	✓
Meet Online or At Our Office	✓	✓
Meet At A Café Near You		✓
Goal Planning	✓	✓
Personalised Statement of Advice	✓	✓
Implementation Of Advice	✓	✓
Debt review		✓
Plan A (Super)	✓	✓
Plan B (Personal Insurance)	✓	✓
First Home Saver Scheme	✓	✓
Cashflow Management		✓
Salary Packaging		✓
Retirement Planning		✓
Tax Effective Investing In Personal Name		✓
Centrelink (Including Administration)		✓
Defined Benefit Super Schemes		✓
Roadmap to meet your goals		✓
Initial Advice – Single Funded from Super and cashflow (Initial fee is reduced if you require ongoing advice package on next page)	\$2,500	\$3,000 - \$4,000
Initial Advice – Couple Funded from Super and cashflow (Initial fee is reduced if you require ongoing advice package on next page)	\$3,300	\$4,000 - \$5,000



Involve Wealth

Annual Membership Packages

Annual Ongoing Advice Services

Service	Silver	Gold
Strategy and Portfolio Review (With Advice Document)	✓	✓
Portfolio Catchup/Review (No Advice Document, as many as you require)		✓
Meet Online or At Our Office	✓	✓
Meet At A Café Near You		✓
Secure Online Document Storage		✓
Phone and Email Support	✓	✓
Insurance Claim Support	✓	✓
Centrelink Assistance		✓
Ongoing Advice – Single Funded from Super and cashflow (less if you require ongoing advice package on next page)	\$230 per month	\$292 per month
Ongoing Advice – Couple Funded from Super and cashflow (less if you require ongoing advice package on next page)	\$292 per month	\$375 per month

*In rare instances we may change an additional upfront or higher ongoing fees if we feel additional work is required or our packages don't meet your needs. If this is the case, we will speak to you to confirm any fees before we commence a plan.