

OUR REVIEW SERVICE

Our ongoing review service incorporates the following elements:

STRATEGIC ADVICE

- Formal review Statement of Advice prepared on an annual, half-yearly or quarterly basis.
- Face to face with meeting(s) with your Adviser to discuss the above report and recommendations.
- Additional strategy meetings with your Adviser as required.
- Pre-financial year end analysis of your situation and recommendations.
- Referral service to other professionals (eg. taxation, estate planning, general insurance).
- Unlimited phone access to Financial Planner and support staff.

INVESTMENT ADMINISTRATION

- Processing of all cash, term deposit, share and managed fund transactions
(Please note that third-party internet brokerage and/or transaction fees may apply).
- Written advice on corporate actions for direct share investments.
- Collation of all year-end taxation information for your Accountant.

REGULAR CONTACT

- Verbal and written contact between review meetings regarding investment and strategy considerations.
- Data Collection Form sent to you once per annum to update financial position.
- Quarterly 'Prosperitas' Newsletter mailed to your preferred address.
- Email updates on investment markets and strategies.
- Invitation to six-monthly financial planning seminars.
- On-line access to your portfolio.

FEE BASIS

Annual Service	0.66% per annum subject to minimum fee of \$2,200 per annum.
Half-Yearly Service	0.88% per annum subject to minimum fee of \$5,500 per annum.
Quarterly Service	1.1% per annum subject to minimum fee of \$11,000 per annum.

Please note that listed Australian share investments are only available under the half-yearly or quarterly service.



ABN 24 943 115 344

Level 1, 587 Canterbury Road
Surrey Hills Victoria 3127
T 03 9830 0366 F 03 9830 7028
www.planningpartners.com.au
advice@planningpartners.com.au

The information on this website does not take into account the objectives, financial situation or needs of any particular person. Before making an investment decision you should consult with your financial advisor and consider whether it is appropriate in light of your particular objectives, financial situation and needs.

Planning Partners Pty Ltd. Australian Financial Services Licence No. 222835 ABN: 24 943 115 344