



SERVICE PACKAGES

SERVICE	INFINITE PACKAGE	LIFESTYLE PACKAGE	ESSENTIALS PACKAGE
Review	1 per annum incl. SoA	1 per annum	Every 2nd year
Access to your Financial Planner	Priority	Unlimited	✓
Referrals to other Professionals	✓	✓	✓
Newsletters	✓	✓	✓
Assistance Dealing with Government Departments	✓	✓	
Assistance Dealing with Legal and/or Tax Advisers	✓	✓	
Direct Equity Portfolio Management	✓	✓	
Annual Lifestyle Phone Review	✓		
Co-ordination of Annual Documentation with Accountant and other Professionals	✓		
Annual Customised Portfolio Report	✓		
PRICE STARTING ANNUALLY FROM	\$5,500	\$3,300	\$1,650