Get the answers – Sleep Easy

rise financial

service overview

When we retire, some people want to be rich

Others are content to live on a pension.

Most of us just want the financial security that lets us keep living the way we always have.

Do you worry about whether you'll have enough to live on? Are you unsure about the right steps to take for wealth accumulation?

Don't despair. As your trusted, independent financial advisor, we will help you get the answers, sleep easy and Rise Financial!

25 Michell Street, Monash ACT 2904 | PO Box 6260, Conder ACT 2906
www.risefinancial.com.au | Telephone 02 6292 0015 | Facsimile 02 6292 0071
ABN 86 350 987 645 | AFS Licence No. 311718

Rise Financial is different from other financial advisors.

We recognise the uncertainty that surrounds planning your financial life and retirement.

We will build a productive relationship with you – based on understanding your needs – and devise tailored solutions that you can trust to deliver.

We will provide you with certainty about steps you can take to achieve financial security and maintain your lifestyle for the rest of your life.

Confidence starts with knowing the cost of financial planning.

Rise Financial is a 'fee-for-service' financial advisor. That means you know up front what planning will cost. We return any commissions to your portfolio which is where they belong.

This means you can trust that our advice is based only on the best action required to meet your specific needs.

How we'll open up your financial future

We can open up a world of possibility – show you what your financial future can look like.

We will map out financial strategies and assess expected results based on your retirement spending intentions.

We'll answer all those niggling financial questions you lie in bed thinking about – you'll wake up in the morning feeling great!

Rise Financial Products

Our range of products allows you to take a step by step approach to your financial planning.

You can start with a simple assessment and build to a full 'Wealth Management Service'– depending on your individual needs.

Below is a list of our fee-for-service products:

- **Financial Check Up** – general discussion on current situation and questions about future plans
- **Salary Packaging Advice** – calculate, assess and inform on salary packaging options
- **Personal Insurance Analysis** – manage risks to your future plans, identify the best insurance options
- **Financial Projection** – examine current situation, project debt and income and spending capacity in retirement
- **What If… Strategy Analysis** – compare your current strategy with an alternate strategy you are considering.
- **Strategic Financial Plan** – explore and compare different approaches to achieve new income goals for the future
- **Wealth Management Service** – implement the preferred strategy through superannuation, managed investments, property and other means.

More Information

If you'd like more information on Rise Financial, our fee-for-service approach or any of our individual products, please phone the office or check out our website.

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Service Flowchart *(costs inc.GST)*

Initial Service
Financial Check Up **$275**

Additional Initial Services

Salary Packaging Advice
further $55 = total **$330**

Personal Insurance Analysis
further $55 = total **$330**

Financial Projection
further $275 = total **$550**

What if ... Strategy Analysis
further $550 = total **$825**

Strategic Financial Plan
further $2,200 = total **$2,475** *(minimum)*

Ongoing Wealth Management

"Beginning" Service
<$100k **$1,650pa**

"Established" Service
$100k – $500k **$3,300pa**

"Mature" Service
$500k – $1M **$4,950pa**

"Advanced" Service
>$1M **$6,600pa** *(minimum)*

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