Get the answers – Sleep Easy

rise financial

"What have you got?"

financial check up

Some people worry about whether they've done enough to be financially self-sufficient.

Others feel that if they have a job, a house and a guaranteed pension they aren't really financial planning candidates.

But it can be as simple as having someone to talk to about your situation to get you started on the best track to financial independence.

Experience our 'Financial Check Up' for those who just want to get some ideas and to know if they are doing OK.

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

Just Starting to Think About the Future?

Whether you have just started a family or a new job or are moving towards retirement – you will have questions about the best steps to take to achieve security of your lifestyle.

Our 'Financial Check Up' * is a no-obligation, fee-for-service product designed for people who are just starting to think about their financial future.

We Want to Get to Know You

Our staff will first listen to learn about your current financial situation, investment plans and any money concerns you have.

With this knowledge, Rise Financial can provide some general advice on the investment approaches that can help you become financially self-sufficient.

It's also an opportunity for you to "ask the expert" your burning financial questions.

This 'Financial check up' might provide enough information for you to plan the next steps to a sound financial future.

Discuss Your Next Steps

Alternately, you might benefit from other Rise Financial products such as 'Salary Packaging Advice', 'Financial Projection', 'Strategic Financial Plan' or 'Wealth Management Service'.

We can provide you with an up-front fee schedule for the most appropriate advice plan to suit your specific needs.

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.

** With the 'Financial Check Up' no written recommendations are provided. Clients must make an undertaking that they will not act on any information provided without first seeking specific and written advice.*

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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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