

**Get the answers – Sleep Easy**



**“Where are you going?”**

**Planning your financial future is like doing a jigsaw puzzle.**

There's superannuation, investments, the mortgage, pensions and cash flow to fit in. It makes you wonder what sort of picture your current investment strategy will give you when you're older.

Would you like to see a view of your current financial future?

*A Rise Financial 'Financial Projection' will map out the impact of your current strategies on your retirement lifestyle.*

*Get the Answers, sleep easy and Rise Financial!*

**financial projection**

## Do you want peace of mind?

Many people want to know the answer to a simple financial question: "Will what I'm doing now allow me to live the life I want to in retirement?"

Understanding what your financial future looks like allows you to relax and just enjoy your life.

A Rise Financial 'Financial Projection' will examine the investment strategies you currently have and assess whether you need to make changes to meet your financial goals.

## What are your financial parameters?

Our staff will discuss how you can tweak your current tactics to significantly improve your results.

We will first articulate your investment assumptions. Then we will identify a few key lifestyle parameters such as personal spending and saving. From there we can project the impact of small changes on the bigger financial picture.

We'll show you simple ways you can maintain your lifestyle leading up to and during retirement.

## Find out what's possible

A projection will help you answer some key personal questions like: When might debts such as the mortgage be repaid? Can you afford to fund home renovations, take regular holidays or replace your car?

We can also determine whether you are likely to be entitled to any Age Pension.

## What you get

Most of what you learn in this session will be through questions, answers and discussion. A written summary is provided with this service.

You might also find it useful to take home some spreadsheet summaries to help you think about what your next steps might be.

## 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.

**"Understanding what  
your financial future  
looks like allows you  
to relax and just enjoy  
your life."**

### 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)**

