

**Get the answers – Sleep Easy**



**“How Can You Do It Better?”**

**We’d all love to find out how the decisions we make will affect our financial future.**

There’s superannuation, property investment, the share market and managed funds – but how do you know which will give you the future you want?

*A Rise Financial ‘Strategic Financial Plan’ allows you to compare your current strategy with a number of different investment scenarios to find the future that appeals most to you.*

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

**strategic financial plan**

## How can you make the most of your financial situation?

It's great to be able to reflect with satisfaction on the impact of your past decisions.

But good financial planning means that the decisions you make now will more likely result in the future lifestyle you desire.

Scenario planning can help clarify the choices you need to make and the actions to take to get where you want to go.

## The next step in your investment

Following on from a 'Financial Projection', a 'Strategic Financial Plan' will compare your current tactics with alternative investment strategies and risk profiles to give you a number of possible futures to consider planning for.

This service will enable you to compare financial strategies on an 'apples to apples' basis according to your specific situation.

You will be able to envision the benefits of adopting various financial strategies.

## What are the possible scenarios?

The kinds of strategies we can compare for you include: salary sacrifice to superannuation and purchasing investment properties, managed funds or a share portfolio with borrowed funds.

As part of the service we also include personal insurance analysis and discussion around estate planning issues.

We can demonstrate how investments such as insurance and financial planning fees, while making a small impact on long term earnings can greatly increase your plan's chances of success.

## Deciding on your next step

Scenario planning helps to remove obstacles so that you can step forward.

Although no specific recommendations are made at this stage, you will be provided with a written report and a comprehensive presentation meeting to take you step by step through the results of the projections.

From here you can choose to adopt the strategies yourself using your own preferred investments or take advantage of our Rise Financial 'Wealth Management Service' as your guide.

Our aim is for you to leave our office understanding which financial strategies work best for you.

## 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)**

