

Get the answers – Sleep Easy



“Leave it to us!”

As your situation changes – so should your financial plan.

You need the ability to make good financial choices through sound financial advice.

Our Rise Financial ‘Wealth Management Service’ will help you make the best decisions and implement your strategy to achieve your personal, financial goals.

Get the answers, sleep easy and Rise Financial!

wealth management service

Achieve your financial goals

Once you have your goals in place, have a sound financial plan prepared, and a good vision of where you want to be – the next step is to put it all into action.

As part of your 'Wealth Management Service', Rise Financial will implement your preferred strategy and provide ongoing advice to keep you on track as your situation and financial environment changes.

What will Rise Financial do for you?

In accordance with your individual strategy, Rise Financial will enact any of the following:

- Place superannuation or non-superannuation managed fund investments
- Perform a formal, annual review of your strategy implementation
- Prepare ongoing financial strategy comparison
- Provide ongoing access to a financial adviser as required

Additional Services

For an additional fee and where a cost-effective solution can be provided, Rise Financial will also arrange personal insurance, mortgages and leases for our 'Wealth Management Service' clients.

Make smart financial decisions!

There is a lot of information now available to help people plan their financial future.

The problem is that most people have neither the time nor the interest to keep on top of the ever-changing financial market.

Having a Rise Financial personal financial advisor available at call helps busy people make smart financial decisions.

More Information

If you'd like more information on Rise Financial 'Wealth Management Service' or any of our other 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)**

