



initial service agreement

You would like to retain the services of Rise Financial Pty Ltd for the provision of **Initial Services**.

You understand that there is a fee for this service and you have indicated below which service you require:

Initial Services

- Financial Check Up** **Cost \$ 275 (inc. GST)**
 - No written report is provided, and this service does not contain any specific recommendation for you, rather it is general information only, designed to help you understand your current financial situation. You agree you will not act upon any information provided without first seeking specific and written advice and you acknowledge that no financial product or strategy has been, or will be, recommended.
- Salary Packaging Advice** **Cost \$ 330 (inc. GST)**
 - A written summary is provided when considering salary packaging a fully maintained car lease.
- Personal Insurance Analysis** **Cost \$ 330 (inc. GST)**
 - A written summary is provided, however this service does not contain any specific recommendation for you, rather it is general information only, designed to help you understand how to calculate an appropriate level of insurance cover in your situation.

Further Initial Services

- Financial Projection** **Additional Cost \$ 275 (inc. GST)**
 - A written summary is provided, however this service does not contain any specific recommendation for you, rather it is general information only, designed to help you understand the projected outcome for your current financial situation, based upon assumptions we believe reasonable. You acknowledge that no financial product or strategy has been, or will be, recommended.
- What if....Strategy Analysis** **Additional Cost \$ 550 (inc. GST)**
 - A written summary is provided, however this service does not contain any specific recommendation for you, rather it is general information only, designed to help you understand the projected outcome when making various financial choices, based upon assumptions we believe reasonable. You acknowledge that no financial product or strategy has been, or will be, recommended.
- Strategic Financial Plan** **Additional Cost \$ 2,200 (inc. GST)**
 - A written report is provided, however this service does not contain any specific recommendation for you, rather it is general information only, designed to help you understand the projected outcome when making various financial choices, based upon assumptions we believe reasonable. You acknowledge that no financial product or strategy has been, or will be, recommended.

Notes: _____

Please be aware of the following before signing below:

- The **Initial Service** costs advised above will increase where Rise Financial Pty Ltd deems a situation to be more complicated, with the higher fee advised and agreed upon before any work commences.
- Investments will only be recommended and implemented where **Ongoing Service** is required.
- Home loans or lease products will be recommended and implemented for an additional fee, only where an **Ongoing Service** is required, and where a cost effective solution can be provided.
- Personal insurance policies will be recommended and implemented for an additional fee, where a cost effective solution can be provided.

By signing below, you ask Rise Financial Pty Ltd to provide the **Initial Service** for the fee indicated.

Client Name: _____ Signature: _____ Date: _____

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