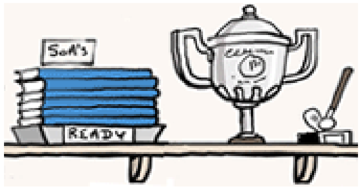
ParaPlanning Pty Ltd AUSTRALIA

Turn these...



...into these!

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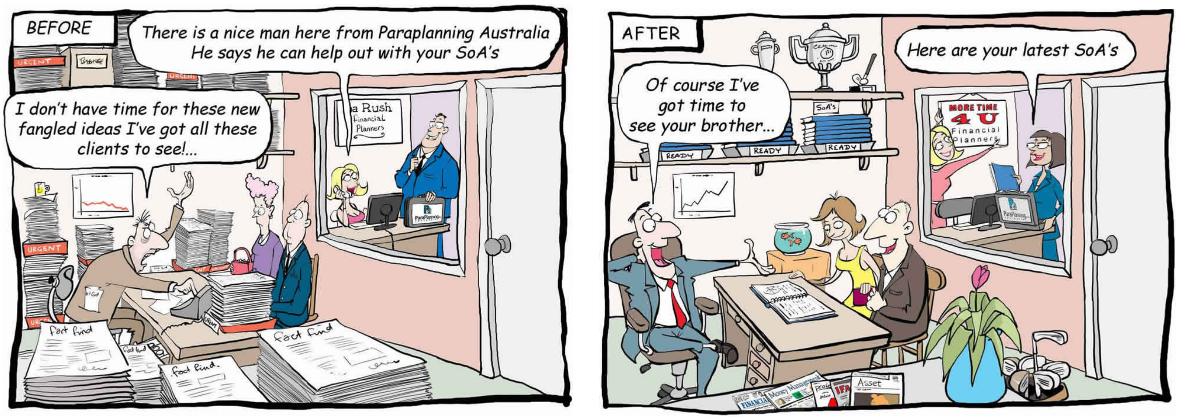
Liverpool, NSW 2170

Sales Support	Trevor Punnett	Tel: (02) 9221 6678
Operational Support	Troy Furze	Tel: (02) 9827 8782

Outsource your Paraplanning to the Professionals!



Paraplanning Australia – http://www.paraplanningaustralia.com.au

How much are you expecting your clients to be contributing to your business - $5K? $10K?, $20K?….more?

Wouldn't you rather be growing your business and seeing more clients than spending time on the more mundane and time consuming aspects of preparing the SoA?

Let Paraplanning Australia take the pain and strain out of preparing your client SoA's to allow you to focus on what you do best – maintaining and developing your client relationships!

Our experienced team of Specialist Paraplanners provide high quality, compliant Statements of Advice quickly, competitively and without fuss.

Professional – Convenient – High Quality – Compliant – Cost Effective – Flexible – Fast - & Friendly!

Our Statements of Advice documents are prepared by qualified and experienced Paraplanners, well versed in approved products, software and compliance requirements.

Service fees are also very competitive, starting from as little as **$285 + GST** (even before our Volume Discounts!). So if you're finding your Paraplanner costs are burning a hole in your pocket, we can help there too!

Whether you need our services only occasionally or regularly, we undertake to provide a turnaround time for a basic plan in as little as 2-3 days. So why not contact us today. We are ready to assist with your SoA's immediately!

Category	SOA Type	Prices From
A	Straight forward single investment strategy	$285 + GST
B	Comprehensive plan involving one investment strategy	$380 + GST
C	Comprehensive plan that involves up to 2 investment strategies; more complex Category B plans	$500 + GST
D	Comprehensive plan involving numerous or complicated strategies	$595 + GST
E	Highly complicated plans	Individual quote + GST

Category Descriptions (one option available from each category)

Category A
Non-superannuation investment only.
Personal risk only - ie basic Life/TPD/Trauma/Income Protection for individuals.
Superannuation only. ($50 + GST extra for each additional superannuation switch)

Category B
Single retirement income stream strategy and may incorporate a re-contribution.
Lump sum investment or insurance within an established Self Managed Superannuation Fund (SMSF).
Combination of Level 1 strategies eg super and risk.
Insurance recommendations for key-persons insurance, business overheads insurance etc.
Super or investment effecting reassessment of Centrelink entitlements.

Category C
Transition to retirement.
Gearing.
Commencement of income stream for client and spouse.
Investment and retirement income.
Comparison of Category B Plans ie alternative strategy to recommended strategy.
Wealth creation plan involving at least two of the following: debt analysis, education funding, retirement needs analysis.
Established SMSF with combination of insurance and investment.
Small business CGT with no CGT calculations.
Debt management – debt consolidation, home loans, debt recycling, reverse mortgages (AMC's only)

Category D
Creation of SMSF.
SMSF – conversion from accumulation phase to pension phase.
Retirement Income, superannuation and investment.
Gearing and superannuation.
Centrelink involving compensation payouts and estate planning issues.
Comparison of Category C Plans ie alternative strategy to recommended strategy.

Category E
Plans involving complex and manual calculations where financial planning software is unable meet the requirements.
Multiple entities or tax structures.
Combination of comprehensive strategies (Category C or D) or multiple strategies.

	Please tick
Please send me more information	☐
Please call me to discuss our immediate needs	☐
Please call me to arrange a visit	☐

Name: …………………………………………… Company: ………..……………………………………
Email: ………..………………………………… Contact phone: ……………………………………….