

RISING TIDE MEMBERSHIP



Our purpose is to help our clients achieve the freedom to say YES

Everyone's YES is a little different.

Our experience tells us that having peace of mind when your head hits the pillow forms part of that YES, along with having someone there to keep you accountable, help you make decisions and get stuff done in your financial world.

In Your world, stuff changes. In our world, legislation and products change. Having ongoing access to our expertise and service will ensure you can spend your time on whatever is important to you - not worrying about what you should and shouldn't be doing with your money.

We keep things simple when it comes to what we provide; so here are our ongoing service offerings. Speak to your adviser about which option is right for you.

Keep in mind that annual advice fees can be tax deductible, so your net cost will be lower than what's outlined below. Depending on your circumstances, a portion may also be split between your bank account and superannuation fund.

Each package below includes;

- all advice tailored to your situation, presented to you by your adviser and implemented
- initiating and facilitating any insurance claims
- make sure all investments, loans and insurances are reviewed to suit your situation.

	FOUNDATIONS	PLATINUM	FREEDOM
Who does this suit?	Getting started and things are simple Young families not self employed	Your financial life is not simple - you have property and investments	Complex cases - businesses, multiple investments, a deeper relationship required
Your investment	Individuals - start @ \$350 p/m Couples - start @ \$450 p/m	Individuals - start @ \$550 p/m Couples - start @ \$650 p/m	Starting @ \$1,000 p/m
Sessions with your adviser	1 planning meeting + ad-hoc support year round	1 planning meeting + ad-hoc support year round	2 planning meetings + ad-hoc support year round
Our promise	We'll get back to you within 24 hours - and take action within 3 business days	We'll get back to you within 24 hours - and take action the next business day	Your personal CFO - we will take action the same business day
Potential future costs	New goals New investments Bonus from work Tax calculations on house sales	Full overhaul of your goals and plan - minor changes there is no extra cost	Nil - all changes to advice & goals are included