

## Value Proposition

ADVISORY SOLUTION	PRODUCT SPECIFIC SOLUTION	CORE SOLUTION	COMPREHENSIVE SOLUTION
Initial Consultation	Free	Free	Free
Initial Plan Fee	Free	* Variable	** Fixed
Implementation Fee	Included	Included	Included
Access to Competitively Priced, Managed Investment Solutions	✓	✓	✓
Access to Competitive Cash Deposit Products	✓	✓	✓
Insurance Review	✓	✓	✓
Assurance Review	✓	✓	✓
Medical Aid Review	✓	✓	✓
Will	✓	✓	✓
Cost/Benefit Analysis on Current Products	✓	✓	✓
Newsletter	✓	✓	✓
Market Reports	✓	✓	✓
Personalised Review Process	Annual	Bi-Annual	Needs Based
Dedicated Financial Advisor	Para-Planner	Para-Planner	Specialist Advisor
Access to Client Portal	Limited	Limited	Unlimited
Investment Seminars & Client Functions	By Invitation	By Invitation	Included
Financial Needs Analysis	-	Core	Comprehensive
Estate Planning	-	-	Comprehensive
Retirement Planning	-	-	Comprehensive
Capital Gains Tax Management	-	-	Comprehensive
Tax Review & Structuring	-	-	Comprehensive
Local & Offshore Structures	-	-	Comprehensive

\* Initial **CORE PLAN** fee will be dependent on complexity - to be quoted on a case by case basis

\*\* Initial **COMPREHENSIVE PLAN** fee to be quoted by your specialist advisor



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