How to Employ A Financial Advisor

OUR MISSION
We empower people to take control of their financial future by providing clarity, confidence, and the guidance they need to make informed decisions.

OUR OBJECTIVE
We strive to deliver exceptional outcomes that exceed expectations and create meaningful, measurable value for every client.

OUR APPROACH
We focus on helping clients achieve above-average results through quality advice, disciplined strategies, and practical solutions that accelerate financial progress and long-term success.

'Plans are worthless, but planning is everything.'
Winston Churchill

Examples of How We've Added Value

- For Ralph, we identified an extra $95,000 of Age Pension benefits were payable over five years.
- For Jeff, we identified $45,000 of tax savings in a single year, which really helped his cashflow.
- For Tony, we identified an extra $500,000 of earnings to provide him a more comfortable retirement.
- For Gayle, estate planning helped reduce $78,000 of inheritance tax payable by her children.

Our THREE-STEP Engagement Process

STEP ONE

We meet and discuss
- at our cost.

We check with you and help you identify: *What are you not happy with, compared to what you are aiming for?*

STEP TWO

Your ***Benefit Analysis Report***
Price for this service: $550

Get your ***Benefit Analysis Report*** and see firsthand the real difference between getting advice vs no advice.

STEP THREE

You now decide
- is the price alright?

You be the judge: *Do the benefits of our* ***Recommendations*** *clearly outweigh the price for advice?*

Pricing is always linked to a service delivered – there are nil hidden ongoing charges

1. **We Document Your Plan**
   The price to document your plan in a Statement of Advice will be in the range of: $2,200 - $6,600 and is usually deducted from either your bank account, super fund or investment portfolio.
2. **We Implement Your Plan**
   The price to implement your plan is on a sliding scale starting at $6,600 and capped at a maximum of $13,200 (the price moves through this range based on 1.1% of the investment assets being managed).
3. **We Review Your Plan**
   The plan implementation service includes your advisor being employed in a 12-month support role, with ***Mid-Year*** and ***End of Year*** offers of review to assess your progress and keep you on-aim for the 'better than average' outcome you seek.

WP Wealth Professionals Pty Ltd. ABN 22 655 645 999. AFSL 537458.