LOW LEVEL PACKAGE: **R5 070** *Once Off* **AND** **R670** on-going thereafter

HIGH LEVEL HOLISTIC PLAN: **R9 700** *Once Off* **AND** **R870pm** on-going thereafter

COMPREHENSIVE HOLISTIC PLAN: ***R14 070** *Once Off* **AND** **R1 270pm** on-going thereafter

*Pricing from

All Prices Exclude VAT and Implementation

FIRST 45 MIN CONSULTATION FREE!

LOW LEVEL PACKAGE: R5 070 AND R670pm

- Analyse current situation and portfolios
- Create or fine-tune your budget
- Setting and prioritising retirement goals
- Identify your appropriate investment strategy
- Determining risk and how to mitigate this
- Your basic financial toolkit:
  - Budget Templates
  - Explanation of different financial products
  - Basic Will & Living Will
  - Basic Power of Attorney
  - Preparing your children for adulthood
- Practical ways to ensure liquidity and longevity of capital
- 1x Face to Face planning meeting to develop your financial plan
- 1x Face to face annual review
- 1x Skype Annual Review

ASPIRE Schedule an Appointment

HIGH LEVEL HOLISTIC PLAN: R9 700 AND R870pm

- All aspects of the Low-Level Package except for accountability Meetings.
- Assessing your medical, and insurance needs
- Tax planning
- Estate Planning and drafting of Wills
- Structure income tax efficiently
- Funding retirement goals and lifestyle
- Advise on downscaling
- Advise on Retirement Homes
- Advise on frail care facilities
- Advise on frail care facilities
- Free attendance to annual Client Appreciation events
- Invitations to bi-monthly Financial Savvy Network Meetings
- 1 Face to Face review meeting per annum
- 2x Skype review meetings per annum
- Access to support staff as and when required

ASPIRE Schedule an Appointment

COMPREHENSIVE HOLISTIC PLAN: *From* R14 070 AND R1 270pm

- All aspects of High-level Holistic Plan, except for review meetings
- Assessing your risk factors and building bespoke investment portfolio's unique to you
- Advise on phased-in retirement
- Finding balance in retirement
- Advise on retirement employment and how to structure income
- Estate planning, and documenting your legacy
- Inter-succession family meetings
- Be your sounding board for all financial decisions.
- Free attendance to bi-monthly Financial Savvy Network meetings
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- Free attendance to annual Client appreciation events
- 2x Face to Face planning meetings to develop your financial plan
- 2x Face to Face reviews per annum
- 2x Skype reviews per annum

ASPIRE Schedule an Appointment

Pricing is negotiable according to your needs, and payment plans can be arranged

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