



- LOW LEVEL PACKAGE:** **R5 700** Once Off **OR**
R870pm for 6 months
- HIGH LEVEL HOLISTIC PLAN:** **R7 500** Once Off **AND**
R670pm on-going thereafter
- COMPREHENSIVE HOLISTIC PLAN:** ***R14 070** Once Off **AND**
***R870pm** on-going thereafter
 *Pricing from

All Prices Exclude VAT and Implementation

FIRST 45 MIN CONSULTATION FREE!

LOW LEVEL PACKAGE: R5 700 OR R870pm

- Analyse current situation and portfolios
- Create or fine-tune your budget
- Setting and prioritising goals with achievable timelines
- Identify your appropriate investment strategy
- Determining risk and how to mitigate this
- Debt analysis and reduction plan
- Your basic financial toolkit:
 - Budget Templates
 - Debt reduction template
 - Bond Calculator
 - Goal setting template
- Explanation of different financial products
- Basic Will & Living Will
- Raising financial savvy children
- Practical ways to save for your short, medium and long-term goals
- 1x Face to Face planning meeting to develop your financial plan
- 4x monthly Skype accountability meetings to track your progress
- 1x Face to Face accountability meeting track your progress and/or re-align your goals



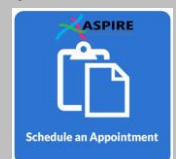
HIGH LEVEL HOLISTIC PLAN: R7 500 AND R670pm

- All aspects of the Low-Level Package except for accountability Meetings.
- Assessing your medical, and insurance needs
- Tax planning
- Education Planning
- Retirement Planning
- Estate Planning and drafting of Wills
- Determine the correct investment strategy for you
- Advise on career or job changes
- 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



COMPREHENSIVE HOLISTIC PLAN: From R14 070 AND R870pm

- All aspects of High-level Holistic Plan, except for review meetings
- Education planning, including research
- Tax planning and ways to optimize this
- Retirement planning, and how to envision retirement
- Estate planning, including drafting of wills, trusts and living Wills
- Assessing your risk factors and building bespoke investment portfolio's unique to you.
- Be your sounding board for all financial decisions
- Free attendance to bi-monthly Financial Savvy Network meetings
- 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
- Access to financial planner and support staff as and when required



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