



LOW LEVEL PACKAGE:

R3 750 Once Off **OR**

R670pm for 6 months

HIGH LEVEL HOLISTIC PLAN:

R6 270 Once Off **AND**

R470pm on-going thereafter

COMPREHENSIVE HOLISTIC PLAN:

R7 000 Once Off **AND**

570pm on-going thereafter

**All prices Exclude VAT, and Implementation costs*

FIRST 45 MIN CONSULTATION FREE!

LOW LEVEL PACKAGE: R3 750 OR R670pm

- Analysing affordability
- Creating a realistic budget for start- up and monthly costs
- Creative ways to leave the nest when funds are limited
- Setting and prioritising goals with achievable timelines
- Practical ways on how to build your credit score and how to improve/ maintain this
- Understanding debt, interest, costs and payment terms
- Advice on contracts/agreements
- Your basic financial toolkit:
 - Budget Templates
 - Debt reduction template
 - Bond Calculator
- Goal setting template
- Explanation of different financial products
- Basic Will & Living Will
- 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: R6 270 AND R470pm

- 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
- Determine the correct investment strategy for you
- 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: R7 000 AND R570pm

- All aspects of High-level Holistic Plan, except for review meetings
- Tax planning and ways to optimize this
- Estate planning, including drafting of wills, trusts and living Wills
- Education planning, including research
- Assessing your risk factors and building bespoke investment portfolio's unique to you.
- 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