

Personal advice services menu

Unlimited access to all services and financial planning advice \$26.40 per month*

- Personal dedicated email and phone line
- Stockbroking research on request
- Financial fact sheets
- Financial planning workshops
- Investment switching advice
- Regular newsletter
- Advice drop in sessions
- Information seminars
- Regular statements
- Super consolidation service

All of the services are included in the monthly fee. You have the option of paying as you go as per the pricing schedule below.

Services**

Stockbroking research for 12 months	\$330
Annual review of your superannuation and insurance strategy	\$660
Binding death nomination advice and execution	\$165
Budgeting	\$220
Claim management	\$660
Estate Planning	\$352
Financial Hardship Applications	\$330
Finding lost super and fund consolidation	\$330
Insurance and asset protection advice	\$550
Investment portfolio review	\$330
Leaving and country – accessing super (advice processing and paperwork)	\$440
Redundancy and employment exit advice	\$440
Salary sacrifice strategies	\$440
Self Management super fund set up advice	\$880
Superannuation comparisons	\$330
Transition to retirement strategy	\$440
Will service	\$297
Withdrawing super/accessing super	\$275
Other services are charged by the hour	\$220

* Fee is gst inclusive and is debited monthly from your superannuation account.

** All services are included in the monthly fee

All other fees are inclusive of gst and are debited from your superannuation account when the service is provided

Morgans Financial Limited

Level 29 Riverside Centre 123 Eagle Street Brisbane QLD 4000 | GPO Box 202 Brisbane QLD 4001 Australia
Telephone +61 7 3334 4888 Facsimile +61 7 3831 0593 www.morgans.com.au

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