

Our focus is on helping you create a secure financial future, no matter what your age or stage in life. We offer packages to suit anyone wanting to take charge of their finances.

Talk to us about which package would best suit you.



Starter

FROM

\$292 per month Incl. GST

- ✓ **Full implementation, set up, management and administrative support** of your financial arrangements and accounts we recommend in your WrightAdams Financial Plan
- ✓ **Access to our yearly service** and investment management package
- ✓ Basic subscription to your **secure client portal**
- ✓ At least **1 formal progress meeting every year** where we check in and measure progress on your WrightAdams Financial Plan
- ✓ A good fit for **young families and retirees** with simple advice requirements.



Intermediate

FROM

\$440 per month Incl. GST

- ✓ **All features and benefits** outlined in the **Starter package**
- ✓ **Pro subscription** to your **secure client portal** (with live banking and investment data feeds included)
- ✓ **1-2 formal progress meetings every year** where we check in and measure progress on your WrightAdams Financial Plan
- ✓ **Remodelling** of future cash flow, asset & liability projections if circumstances have changed
- ✓ **Co-ordinating with your professional network** of accountants, mortgage brokers and solicitors as needed
- ✓ **Liaising with Government agencies** such as Centrelink /DVA including nominee access to your portal as needed
- ✓ A good fit for **established families, pre-retirees, established retirees** and/or **growing small business owners** who require a more hands on level of service.



Advanced

FROM

\$880 per month Incl. GST

- ✓ **All features and benefits** outlined in the **Intermediate package**
- ✓ **2 formal progress meetings every year** where we check in and measure progress on your WrightAdams Financial Plan
- ✓ **Strategic review** of your financial arrangements and revisit of your financial modelling every year or as required
- ✓ **Yearly meeting** with your accountant to review your tax planning requirements as needed
- ✓ **Bespoke specialist financial planning projects** (such as executing on Employee Share Schemes, or investment planning for additional tax entities)
- ✓ A good fit for **established families, small business owners** that have reached maturity and/or **established pre-retirees/retirees** with more complex financial advice needs.