



## AMAFA In-House Paraplanning Service

- **Paraplanning:**
  - Quality Statements of Advice.
  - Research service.
  - Fact Find/Adviser feedback to assist in the compliance process.
- **AMAFA In-House Paraplanning** offers a unique and flexible service to you and your business.

A holistic approach to providing a paraplanning outsourcing solutions for your business.

- Compliance management.
  - Senior paraplanning experience.
  - High level strategic advice.
  - Complex Statement of Advice development and presentation.
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## Pricing

Service	Description	Price (Excl GST)
<b>Paraplanning Fees</b> (Exclusive of GST)	<b>Record of Advice</b> <i>(Hold/Investment Switch/Rebalance)</i> <b>Record of Advice – Other</b> <i>(Based on Quote)</i>	\$220
	<b>Statement of Advice – Risk or Super Only (Single)</b> <b>Statement of Advice – Risk or Super Only (Couple)</b> <ul style="list-style-type: none"> <li>• <i>2x super funds only</i></li> </ul>	\$295 \$395
	<b>Statement of Advice - Business Insurance</b> <i>(2 Business Partners)</i> <b>Statement of Advice - Business Insurance</b> <i>(3+ Business Partners)</i>	\$395 \$495
	<b>Statement of Advice – Super and Risk Only (Single)</b> <b>Statement of Advice – Super and Risk Only (Couple)</b> <ul style="list-style-type: none"> <li>• <i>2x super funds only</i></li> <li>• <i>Projections/Modelling calculations additional cost</i> <i>(Price quoted on request)</i></li> </ul>	\$395 \$495
	<b>Statement of Advice – SMSF Establishing including Investment Strategy</b> <b>Statement of Advice – SMSF Establishing including Investment Strategy and Risk Recommendation</b> <b>Statement of Advice – Existing SMSF for Contribution or Risk Recommendation</b> <b>Statement of Advice – Existing SMSF for Contribution and Risk Recommendation</b>	\$395 \$495 \$395 \$495
	<b>Statement of Advice – Retirement/Account Based Pension/Annuity Advice - (Single)</b> <i>(No Recontribution Strategy - Includes Basic Pension/Cashflow Projection)</i> <b>Statement of Advice – Retirement/Account Based Pension/Annuity Advice - (Couple)</b> <i>(Includes Recontribution Strategy with No Projections)</i> <b>Statement of Advice – Retirement/Account Based Pension/Annuity Advice - (Single)</b> <i>(Includes Recontribution Strategy with Projections)</i> <b>Statement of Advice – Retirement/Account Based Pension/Annuity Advice - (Couple)</b> <i>(Includes Recontribution Strategy with Projections)</i> <ul style="list-style-type: none"> <li>• <i>Maximum of 2 Pension/Retirement Accounts per client</i></li> </ul>	\$395 \$495 \$550 \$650

	<b>Statement of Advice – Medium Complexity (Single)</b> <b>Statement of Advice – Medium Complexity (Couple)</b> <ul style="list-style-type: none"> <li>• 3 Strategies – Super, Risk &amp; Investment</li> <li>• 2x super funds only</li> </ul>	<b>\$550</b> <b>\$650</b>
<b>Paraplanning Fees</b> <b>(Exclusive of GST)</b>	<b>Statement of Advice – Complex (Single)</b> <b>Statement of Advice – Complex (Couple)</b> <ul style="list-style-type: none"> <li>• 4+ Strategies – Super / Risk / Cash Flow / Investment / Debt Management (includes 5-year projections)</li> <li>• 2x super funds only</li> </ul>	<b>\$770</b> <b>\$870</b>
	<b>Strategy Paper</b> <i>Multiple Strategies which require modelling and projections</i> <i>(Price quoted at time of submission)</i>	<b>\$395 Minimum</b>
<b>Research</b>	<b>Super/Risk/Investment - Research Report</b> <i>(WealthSolver/Risk Researcher/Lonsec)</i> <ul style="list-style-type: none"> <li>• Single;</li> <li>• Couple;</li> </ul>	<b>\$50 per report</b> <b>\$75 per report</b>
<b>Administration</b>	<b>Data Input</b> <ul style="list-style-type: none"> <li>• Paper Fact Find into Mainstay</li> <li>• Admin Support</li> </ul>	<b>\$45 per hr</b> <b>(15 min increments)</b>

**Please Note:**

- Some Statements of Advice are 'out-of-the-ordinary'. Where a fee for completion of SoA will be deemed higher than is noted here, in these cases AMAFA will discuss with you and provide a quote for the SoA requested.