



**PURPOSE  
ADVISORY**

# *PA Services Guide*

*Unlock your potential in life, money & business*

**v6.4 – 2 Oct 2024**



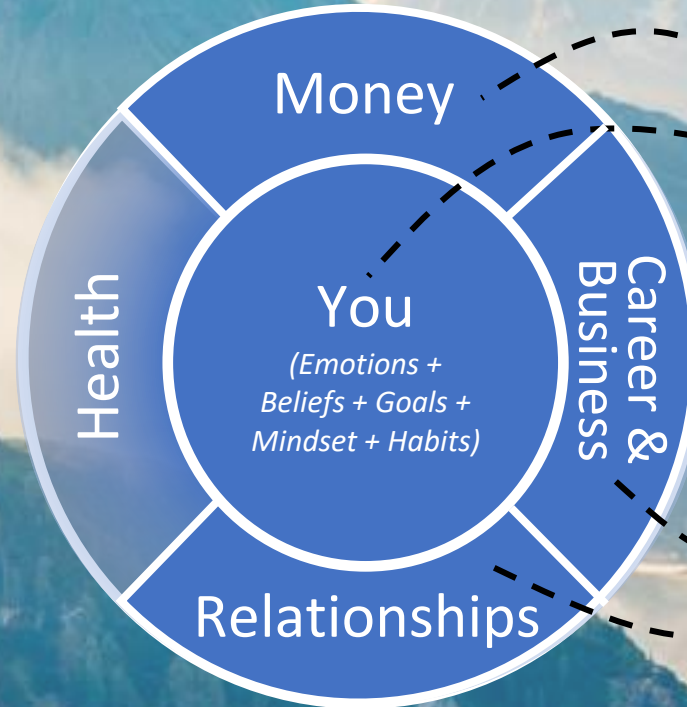
# *Our Mission:*

We provide expert *guidance* on  
**life, money & business** to help you  
fulfill your unique *purpose* and  
meaningfully *contribute* to our world.



# Our Expertise:

*Increase your **Income***  
*Build **Wealth***  
*Have better **Relationships***  
*Live a better **Life***



*We're experts  
at these bits*



# Common Problems we Solve



**EARN more, SAVE  
more, SPEND smart**



**Afford & Buy your  
DREAM HOME**



**Find peace, joy,  
confidence & CLARITY**



**Feel SECURE & get  
out of DEBT**



**Build lasting &  
healthy HABITS**



**Launch, grow & scale  
your BUSINESS**



**Become skilled at  
INVESTING**

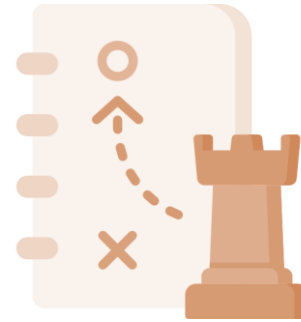
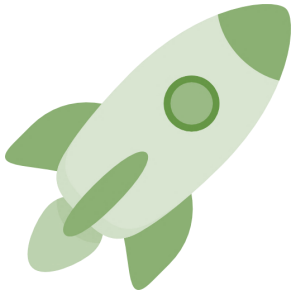


**Connect better in  
RELATIONSHIPS**



# Our Holistic Services

*Broad-spectrum expertise, game-changing results*



## Wellbeing & Relationships

*Mindfulness, Dealing with Stress, Finding Joy, Healthy Relationships, Beliefs, Habits & Personality*

## Career & Business

*Income Increase, Career Progression, Business Strategy, Building Team, Systems & Processes, Funding & Scaling*

## Wealth Creation & Cashflow

*Life Planning, Cashflow, Debt, Couples, Kids, Home Ownership, Shares, Property, Trading, FIRE*

## Financial Product Advice

*Investment Portfolios, Personal Insurance, Superannuation, SMSF, Trusts, Complex Strategies*

# Our Expert Team

*Achieving greater results through integrative collaboration*



**Tristan Scifo**

Licensed Financial Adviser, Director  
B. Commerce & Applied Finance



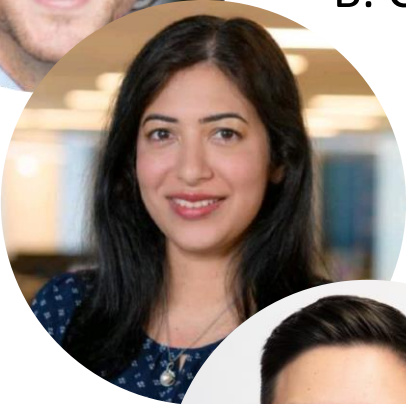
**Wealth &  
Cashflow**



**Financial  
Advice**

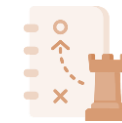


**Career &  
Business**



**Sabena Samuel**

Licensed Financial Adviser, CFP  
B. Commerce, Accounting & Finance



**Wealth &  
Cashflow**



**Financial  
Advice**



**Roy Kwan**

Licensed Hypnotherapist  
B. Science & Engineering



**Wellbeing &  
Relationships**



**Career &  
Business**

# What Our Clients Say..

**Ben McCreery**

10 reviews



Tristan and the team are so helpful and incredibly generous always going above and beyond as me and my wife are exploring purpose and growing our wealth. A-team!

**Luke Thorn**

7 reviews



**Positive:** Quality

The Purpose Advisory team are an invaluable resource for anyone wanting to take hold of their financial future. The coaching sessions provided a great platform and process for my wife and I to discuss our financial future and identify key opportunities + weaknesses and plan accordingly. The PA team provide amazing value at accessible pricing. Thanks for a great service!

**Nazira Zuptarova**

4 reviews



Amazing team, very helpful and are carrying. Will listen to all your concerns and advise accordingly. Tristan and his team are highly professional, and before coming up with advance will do a proper research. They do truly care for their customers and provide holistic advice. Highly recommended.

**Megan Gilbert**

1 review



We have loved working with Tristan at Purpose Advisory. Each session has had so much value as we strategically plan ahead for our future. Thank you Tristan!

**Brendan D**

1 review



Very educational and informative. Targeting millennials and making us think deeply of our future and decisions to best serve ourselves, loved ones and community. Thank you for your hard work and effort into helping others.

**Teri Dalton**

8 reviews



**Positive:** Professionalism, Quality, Responsiveness, Value

During the discovery meeting Tristan really listened to my story and helped me work out what might be the best possible way to get my finances back on track. I'm excited to finally get the help and advice I need so I don't need to worry about my finances anymore.

**Peter Ryburn**

4 reviews



We underestimated the power of having both financial advisor and life coach in one person. It's an amazing thing when you find someone who not only cares about increasing your wealth, but aligning and directing your growing wealth to purpose. My wife and I couldn't be more satisfied with the services provided by 'Purpose Advisory'.

**Tami Sussman**

15 reviews



We've been really impressed by our coaching sessions with Harry from Purpose Advisory. His explanations are clear, informative & enlightening and Harry is very approachable, ethical, flexible & knowledgeable with a quick response rate to emails and phone calls. Highly recommend.



An aerial photograph of a turbulent ocean. The water is a deep, vibrant turquoise color, with white foam and spray from the waves creating a high-contrast, textured surface. The waves are crashing over dark, jagged rocks that are visible at the bottom of the frame. The overall scene conveys a sense of raw, natural power and movement.

*How We Work*



# Multiple Delivery Modes

*We combine four powerful delivery modes to deliver results*



## 1. DIY RESOURCES

*Do-it-yourself*

- *Practical Online Courses*
- *Powerful DIY Tools & Templates*
- *Fantastic Resource Recommendations*



## 2. GROUP COACHING

*Done-with-others*

- *Regular Group Masterminds*
- *Online Community Forums*
- *In Person Events & Retreats*



## 3. PERSONAL COACHING

*Done-with-you*

- *Wellbeing & Relationship Coaching*
- *Wealth & Cashflow Coaching*
- *Career & Business Coaching*



## 4. FINANCIAL ADVICE

*Done-for-you*

- *Financial product recommendations*
- *Financial investment & structures advice*
- *Long term financial modelling*



# Support Across All of Life

*Choose relevant life areas we'll coach & advise you through*



## **Mindset**

*Boost income,  
increase  
confidence,  
improve wellbeing*



## **Relationships**

*Address conflict,  
restore  
relationships, heal  
& find peace*



## **Life Plan**

*Clarify purpose,  
define vision,  
create a Life Plan*



## **Cashflow**

*Save more, pay  
down debt &  
improve cashflow*



## **Protection**

*Sort out  
insurances,  
manage risk &  
estate planning*



## **Investment**

*Buy property,  
shares & learn to  
build wealth*



## **Business**

*Start, grow & scale  
a successful  
business / grow  
your career*



## **Personal Coaching**

*Done-with-you*



## **Group Coaching**

*Done-with-others*



## **Financial Advice**

*Done-for-you*



# !! Coaching Warning

## Coaching ≠ Personal Financial Advice

### COACHING

*(a.k.a. “General Advice”)*

Coaching can include general guidance, but doesn’t include recommendations for specific financial products, unique to your situation.

*We educate you on the facts, pose questions, share experiences, and leave the final decision to you.*



VS

### ADVICE

*(a.k.a. “Personal Financial Advice”)*

Advice includes specific financial recommendations relevant to your unique situation and goals. It requires an “SOA” to be provided.

*We specify investment platforms & underlying investments, or specific insurance products optimal for you.*



*Importantly, none of our coaching interactions should be seen as personal financial advice. Any financial product advice we give must by law be delivered by a qualified & licensed financial adviser, and this advice must be documented in a Statement of Advice (SOA) or Record of Advice (ROA). Please ensure you read our [Financial Services Guide \(FSG\)](#), located on our website, for more details about our advice services.*





# *One-off Services*

## Menu Overview

# Our Discovery Process

Value-focussed onboarding experience
















# Wellbeing Coaching Options

For those seeking **purpose, peace and better relationships**












Single Price  
Couple Price

	 DIRECTION	 EMOTION DETOX	 RELATIONSHIP DETOX
	 \$1,290  \$1,490	 \$2,290  \$3,490	 \$3,990  \$6,990
Client Portal Access	✓	✓	✓
Purpose, Life Goals & Career Support	✓	✓	✓
Clear Anger, Sadness, Fear, Hurt, Guilt	-	✓	✓
Clear Emotions from Past Relationships	-	-	✓
1:1 Coaching Sessions	4x Sessions	5x Sessions	10x Sessions
Additional Sessions	\$220/hr	\$330/hr	\$330/hr
Additional PA Services Discount*	10% off	10% off	15% off
Service Period	2 - 4 months	1 - 2 months	3 - 6 months

**\*Additional PA Services Discounts** enable you to purchase additional PA Coaching & Advice services at a discounted rate.  
These discounts can't be stacked with other discounts and last only for the duration of your package.

# Money Basics Coaching Options

Scoped packages for those needing help to **save, manage debt and manage risks**










	 <b>MONEY SIDEKICK</b>  \$900  \$900	 <b>INSURANCE</b>  \$990  \$1,090	 <b>CASHFLOW</b>  \$1,390  \$1,590
Client Portal Access	✓	✓	✓
Budgeting, Banking & Saving Support	✓	✓	✓
Personal Insurance Support	-	✓	-
Money Mindsets Support	-	-	✓
1:1 Coaching Sessions	<b>4x 1hr Sessions</b>	<b>1.5x 2hr Sessions</b>	<b>3.5x 2hr Sessions</b>
Additional Sessions	\$250/hr	\$385/hr	\$250/hr
Additional PA Services Discount*	10% off	10% off	10% off
Service Period	2 - 4 months	1 - 2 months	2 - 4 months

**\*Additional PA Services Discounts** enable you to purchase additional PA Coaching & Advice services at a discounted rate.  
 These discounts can't be stacked with other discounts and last only for the duration of your package.



# Wealth Creation Coaching Options

For those desiring to **build wealth** and make **great life decisions**

	 <b>INVESTMENT</b>  \$2,490  \$2,790	 <b>WEALTH FOUNDATIONS</b>  \$3,990  \$4,290	 <b>WEALTH MASTERY</b>  \$5,890  \$6,690
Client Portal Access	✓	✓	✓
Investment & Super Coaching	✓	✓	✓
Life Planning, Cashflow & Insurance	-	✓	✓
Emotion Detox (Income Increase)	-	-	✓
1:1 Coaching Sessions	<b>4x Sessions</b>	<b>10x Sessions</b>	<b>15x Sessions</b>
Additional Sessions	\$385/hr	\$385/hr	\$385/hr
Additional PA Services Discount*	15% off	15% off	20% off
Service Period	2 - 4 months	5 - 10 months	6 - 12 months

**\*Additional PA Services Discounts** enable you to purchase additional PA Coaching & Advice services at a discounted rate.  
 These discounts can't be stacked with other discounts and last only for the duration of your package.



# Career/Business Coaching Options

*For driven professionals & entrepreneurs wanting transformational change*



Single Price  
Couple Price

	5x SESSIONS \$2,990 <i>Life, Career &amp; Business</i>	12x SESSIONS \$5,990 <i>Life, Career &amp; Business</i>	25x SESSIONS \$10,990 <i>Life, Business &amp; Wealth</i>
<i>Client Portal Access</i>	✓	✓	✓
<i>Business / Career Planning</i>	✓	✓	✓
<i>Emotion Detox &amp; Sales Mindset</i>	✓	✓	✓
<i>Brand, Marketing &amp; Presenting</i>	✓	✓	✓
<i>Investment &amp; Wealth Coaching</i>	-	-	✓
<i>1:1 Coaching Sessions</i>	<b>5x</b> Weekly / Fortnightly	<b>12x</b> Weekly / Fortnightly	<b>25x</b> Weekly / Fortnightly
<i>Group Program</i>	<i>ProAcelerator</i>	<i>ProAcelerator</i>	<i>ProAcelerator</i>
<i>Additional PA Services Discount*</i>	15% Off	15% off	20% off
<i>Service Period</i>	1 - 2 months	3 - 6 months	6 - 12 months

**\*Additional PA Services Discounts** enable you to purchase additional PA Coaching & Advice services at a discounted rate.  
These discounts can't be stacked with other discounts and last only for the duration of your package.





# Business Consulting Hands-on Service

For *entrepreneurs* committed to take their business next level

## Phase 1. Advice:

Enhance awareness + receive tailored recommendations

## Optional Business-360

Engage deeper analysis to map out a more robust action plan

## Phase 2. Action:

We project manage / support the delivery of agreed strategies using our in-house experts & professional trusted partners

## Optional Coaching:

We provide regular 1:1 executive coaching sessions to support effective execution & evolution

Business Diagnostic



2hr Discovery Session



Business Success Action Plan

**\$997**  
(Value package)

Market Research & Data Analysis

2x 1hr Executive Coaching Sessions

90min Key Team Group Workshop



**\$3,000 - \$6,000**  
(varies with business size)

Strategy & Finance

Strategic Direction / Funding

Map & Manage Cashflow

Profitability / Market share

Sales & Delivery

Improve Sales / Conversion

Automate / Scale sales

Retain more clients

Marketing & Branding

Source more quality leads

Build reliable lead engine

Build lasting Brand

Processes & Systems

AI-integration & Automation

Minimise costs

Improve efficiency & quality

People & Leadership

Recruitment & Offshoring

Superpowers & people in right seats

Performance, Culture & Retention

**Fees dependent on strategy**  
(options will be detailed in your Business Success Action Plan)

5x Sessions

**\$3,590**

Mindset & Strategy

12x Sessions

**\$7,990**

+ Leadership & Sales

25x Sessions

**12,990**

+ Wealth Management



# Financial Advice Service Menu

	Investing & Building Wealth	Single	Couple		Cashflow & Money Management	Single	Couple
<input type="checkbox"/>	Investment Portfolio Advice	\$2,500	\$3,000	<input type="checkbox"/>	Cashflow Advice	\$2,000	\$2,500
<input type="checkbox"/>	Micro-investment Advice <\$10k	\$1,000	\$1,200	<input type="checkbox"/>	Debt Restructuring Advice	\$2,000	\$2,500
<input type="checkbox"/>	Child / Education Bond Advice	\$2,800	\$3,500	<input type="checkbox"/>	Vehicle Salary Packaging Advice	\$1,500	\$2,500
<input type="checkbox"/>	Investment + Super Advice	\$3,500	\$5,000		Insurance & Risk Management	Single	Couple
<input type="checkbox"/>	Investment + Insurance Advice	\$3,800	\$5,200	<input type="checkbox"/>	Insurance Advice (Full review)	\$3,300	\$4,400
<input type="checkbox"/>	Investment + Super + Insurance Advice	\$5,000	\$6,500	<input type="checkbox"/>	No-Advice Insurance (Execution-only)	\$900	\$1,500
<input type="checkbox"/>	Add-on: Gearing on Investment Portfolio	\$500	\$750		Super & Retirement	Single	Couple
<input type="checkbox"/>	Add-on: Tailored Ethical Portfolio	\$500	\$750	<input type="checkbox"/>	Super Advice (Full review)	\$2,800	\$4,000
<input type="checkbox"/>	Add-on: Multiple Existing Assets to Review	\$400ph		<input type="checkbox"/>	Super + Insurance Advice	\$4,000	\$5,500
	Business	Single	Couple	<input type="checkbox"/>	Pre-retirement Advice ( <i>with</i> investments)	\$6,000	\$7,500
<input type="checkbox"/>	Business Cashflow Advice	\$3,000		<input type="checkbox"/>	Pre-retirement Advice (no investments)	\$4,500	\$5,500
<input type="checkbox"/>	Business Investment Advice	\$4,000		<input type="checkbox"/>	Retirement Advice ( <i>with</i> investments)	\$4,200	\$5,000
<input type="checkbox"/>	Business Succession / Insurance Advice	\$5,000		<input type="checkbox"/>	Retirement Advice (no investments)	\$3,500	\$4,500
<input type="checkbox"/>	Complex Business Structuring Advice	\$7,000		<input type="checkbox"/>	Add-on: SMSF	\$1,500	\$2,200





# *One-off Services*

## Individual Package Plans



# “Emotion Detox” Coaching Package

5x 90min sessions to improve your Mindset & Decisions, over 1 month (max 2 months)



OPTIONAL ADD-ONS

3x monthly group **Wellbeing Mastermind** sessions

## Key Outcomes:

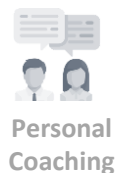
- Clear major negative emotions from the past (anger, sadness, fear, hurt, guilt)
- Increase your income (whether you're employed, side-hustling or run a business)
- Improve the quality of your relationships
- Experience more joy, peace and stamina in your life each day
- Manage and reduce negative symptoms of stress & anxiety

**Single: \$2,290 (incl. GST)**  
**Couple: \$3,990 (incl. GST)**  
Payable upfront



# “Relationship Detox” Coaching Package

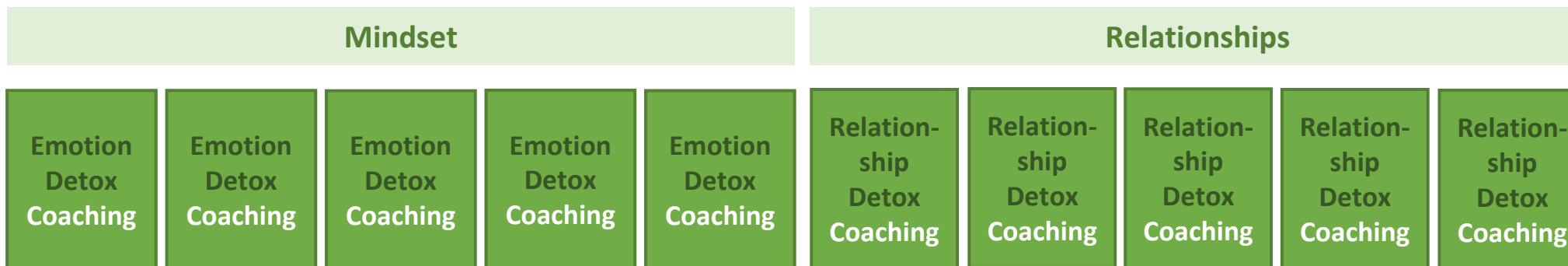
10x 90min sessions to improve your Relationships, over 3 months (max 6 months)



Personal Coaching



Group Coaching



15% Off Coaching & Advice

OPTIONAL ADD-ONS

3x monthly group **Relationship Mastermind** sessions

## Key Outcomes:

- Clear major negative emotions from the past (anger, sadness, fear, hurt, guilt)
- Clear negative emotions from close relationships (parents, siblings, partners friends)
- Experience more joy, peace and stamina in your life each day
- Manage and reduce negative symptoms of stress & anxiety
- Improve your capacity and desire for healthy, relational connections

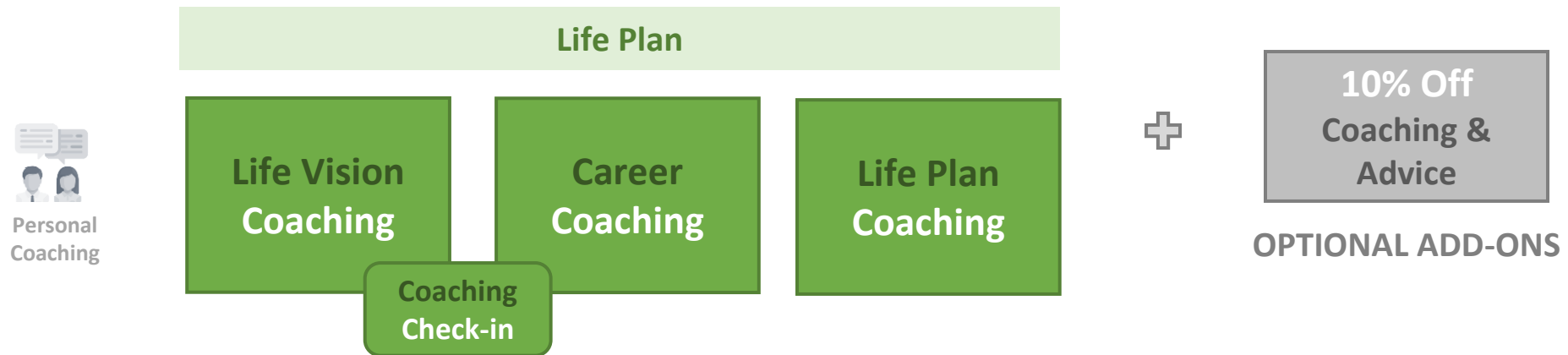
**Single: \$3,990 (incl. GST)**

**Couple: \$6,990 (incl. GST)**

Payable upfront

# *“Direction” Coaching Package*

*3.5x 2hr sessions to create a Life plan, over 2 months (max 4 months)*



## **Key Outcomes:**

- *Clarify your values and life purpose*
- *Create a compelling 10-year vision for your life & a plan to get there*
- *Set up financial milestones and targeted short-term goals*
- *Clarify your career aspirations, prospects and strategy*
- *Establish a life Plan & an ongoing personal development plan*

**Single: \$1,290 (incl. GST)**

**Couple: \$1,490 (incl. GST)**

*Payable upfront*





# *“Money Sidekick” Coaching Package*

*4x 1hr sessions to Find Fun & Get In Control of your Money, over 2 months (max 4 months)*

Person Admin, Cashflow & Investing Basics



Money  
Sidekick  
Coaching

Money  
Sidekick  
Coaching

Money  
Sidekick  
Coaching

Money  
Sidekick  
Coaching

## **Key Outcomes:**

- *Overcome avoidance & make money fun again*
- *Get support with budgeting, spending & saving*
- *Get on top of your tax requirements & improve your personal admin*
- *Transition successfully back into work or into earning an income*
- *Get help with Centrelink benefits and/or applications*

**\$900 (incl. GST)**

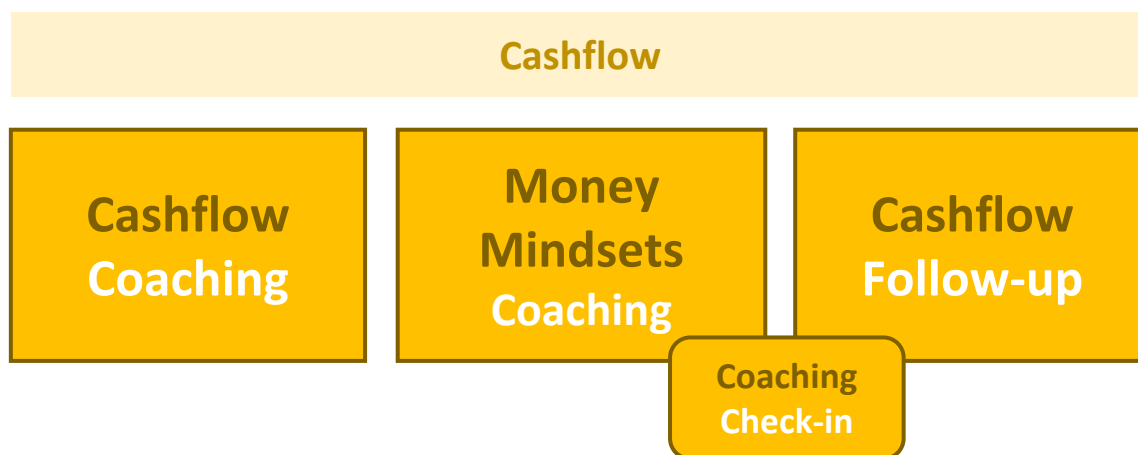
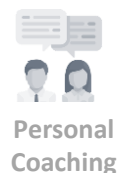
*Payable upfront  
(payment plans available upon request)*

**+ Additional Sessions  
from \$250 / hr (incl. GST)**



# “Cashflow” Coaching Package

3.5x 2hr sessions to create a Cashflow plan, over 2 months (max 4 months)



## Key Outcomes:

- Understand & upgrade your money beliefs, emotions & mindset
- Create an automated cashflow plan with a savings plan that works
- Set up a digital tracking app to provide a useful money dashboard
- Optimise your banking structure, regular savings & transactions
- Combine & manage finances effectively as a couple

**Single - \$1,390 (incl. GST)**

**Couple - \$1,590 (incl. GST)**

*Payable upfront  
(payment plans available upon request)*

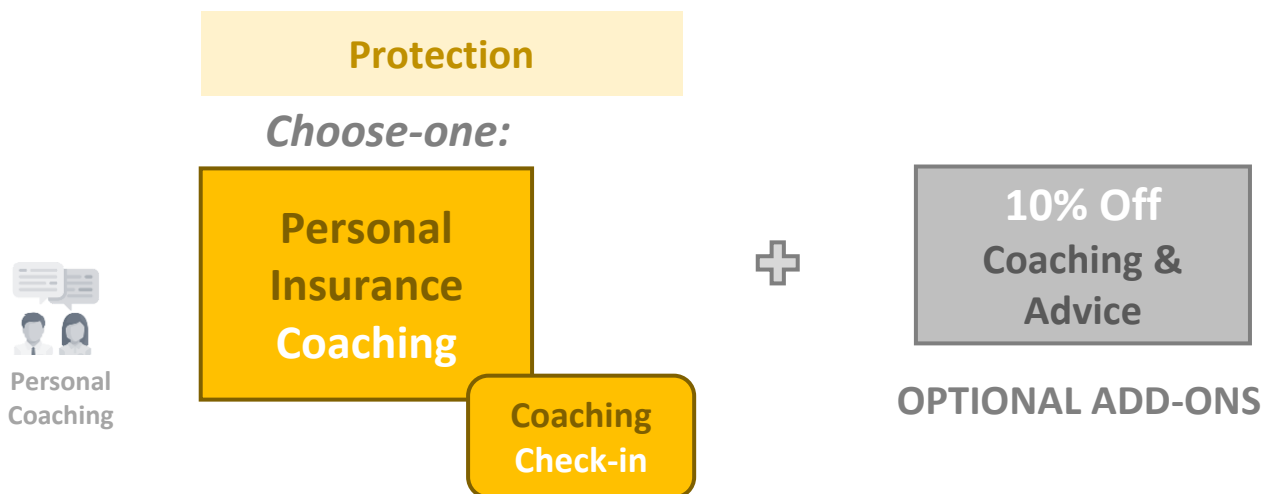
**+ Optional Money Sidekick Support  
from \$250 / hr (incl. GST)**





# *“Insurance” Coaching Package*

*1.5x 2hr sessions to Protect your Wealth, over 1 months (max 2 months)*



## **Key Outcomes:**

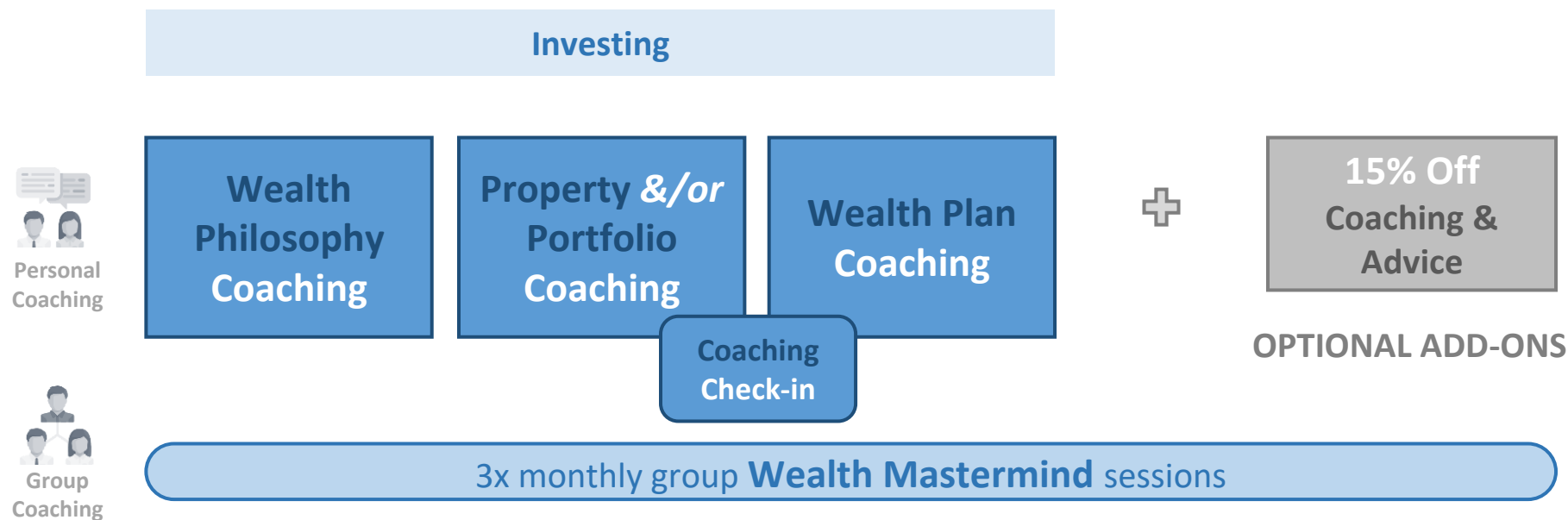
- *Learn the fundamentals & mechanics of the personal insurance market in Australia*
- *Identify and plan for major financial risks across your finances*
- *Calculate how much of each type of insurance you need*
- *Access tools to compare and decide on the best insurance policy options for you*

**Single: \$990 (incl. GST)**  
**Couple: \$1,090 (incl. GST)**  
*Payable upfront*



# *“Investment” Coaching Package*

*3.5x 2hr tailored sessions to create a Wealth plan, over 2 months (max 4 months)*



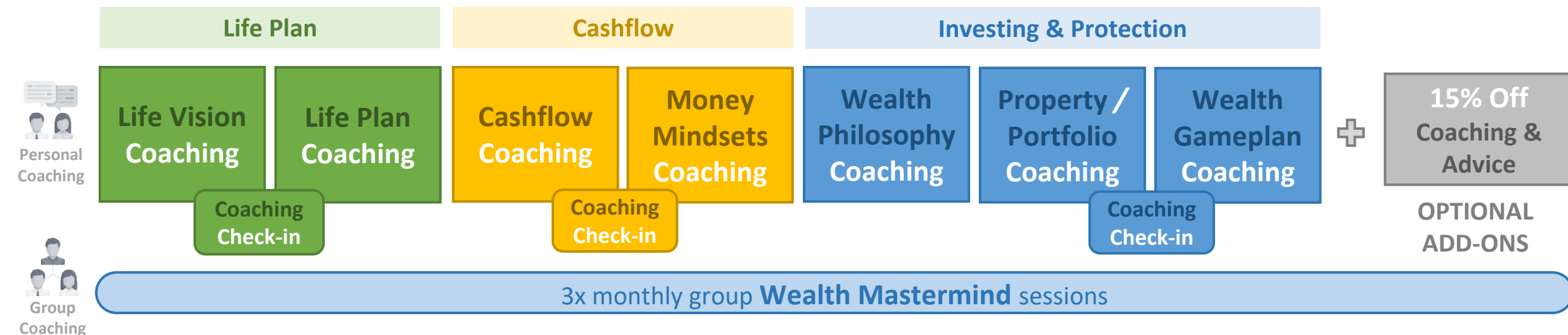
## **Key Outcomes:**

- *Learn the fundamentals & practical success principles of investing*
- *Explore various wealth creation strategies & clarify your wealth philosophy*
- *Refine either your property strategy or investment portfolio strategy*
- *Create a wealth gameplan to guide your investments, super & risk protection*
- *12-month subscription to our monthly group Wealth Mastermind*

**Single: \$2,490 (incl. GST)**  
**Couple: \$2,790 (incl. GST)**  
*Payable upfront*

# “Wealth Foundations” Coaching Package

10x 1-2hr sessions to create a Life & Wealth plan, over 5 months (max 10 months)



## Key Outcomes:

- Create a (shared) 10-year vision, financial milestones & achievable financial targets
- Implement a stress-free, automated cashflow plan
- Understand & upgrade your money beliefs, emotions & mindset
- Refine a personalised wealth philosophy to guide your investment decisions
- Create a gameplan for how to invest & build wealth long term
- Get upskilled on your super strategy & insurance needs

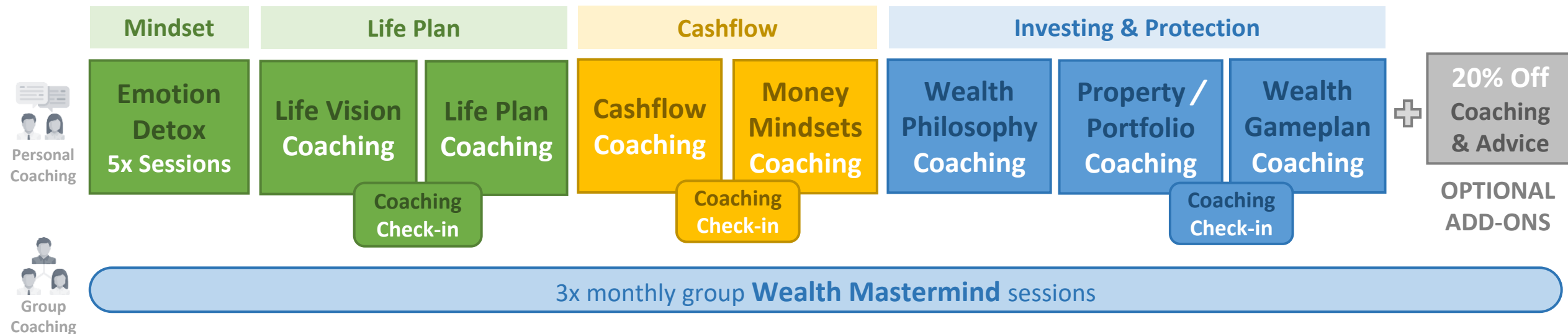
**Single: \$3,990 (incl. GST)**  
**Couple: \$4,290 (incl. GST)**

Payable upfront



# “Wealth Mastery” Coaching Package

15x 1-2hr sessions for creating a Life & Wealth plan, over 6 months (max 12 months)



## Key Outcomes:

- Create a (shared) 10-year vision, financial milestones & achievable financial targets
- Implement a stress-free, automated cashflow plan
- Understand & upgrade your money beliefs, emotions & mindset
- Refine a personalised wealth philosophy to guide your investment decisions
- Create a gameplan for how to invest & build wealth long term
- Get upskilled on your super strategy & insurance needs

**Single: \$5,890 (incl. GST)**  
**Couple: \$6,990 (incl. GST)**

Payable upfront

# Career/Business 5x Sessions

5x 90min sessions to grow your Income or Business, over 1 month (max 2 months)



## Key Outcomes:

- Clear major negative emotions from the past (anger, sadness, fear, hurt, guilt)
- Improve business mindset, stress tolerance & strategic flexibility
- Upskill sales skills & boost sales effectiveness to increase revenue
- Join weekly group masterminds to progress your business & learn success principles
- Connect with our network of entrepreneurs & our trusted referral partners

**\$2,990 (incl. GST)**

Payable upfront

# Career/Business 12x Sessions

12x 90min sessions to grow your Income or Business, over 3 months (max 6 months)



Personal  
Coaching



Group  
Coaching



Strategy



Mindset



Sales



Accountability

**Business Coaching**

**12x Coaching Sessions**



**15% Off  
Coaching  
& Advice**

OPTIONAL ADD-ONS

Access to our **ProAcelerator** group sessions & community

## Key Outcomes:

- Improve your mindset, stress tolerance and strategic flexibility
- Supercharge your sales & implement a successful marketing strategy
- Streamline your business systems & build a thriving team
- Gain CFO-style insights on strategy & cashflow
- Join weekly group masterminds to progress your business & learn success principles
- Connect with our entrepreneur network & our trusted referral partners

**\$5,990 (incl. GST)**

Payable upfront



# Career/Business 25x Sessions

25x 90min sessions to grow your Income or Business, over 6 months (max 12 months)



Personal  
Coaching



Group  
Coaching

 Strategy

 Mindset

 Sales

 Accountability

 Wealth

**Business Coaching**  
**25x Coaching Sessions**



**20% Off**  
**Coaching**  
**& Advice**

**OPTIONAL**  
**ADD-ONS**

Access to our **ProAcelerator** group sessions & community

## Key Outcomes:

- Improve your mindset, stress tolerance and strategic flexibility
- Supercharge your sales & implement a successful marketing strategy
- Streamline your business systems & build a thriving team
- Gain CFO-style insights on strategy & cashflow
- Review your personal life plan, cashflow and financial position
- Create a gameplan for how to invest & build wealth long term
- Join our weekly group masterminds & connect with our network

**\$10,990 (incl. GST)**

Payable upfront

A photograph of two children playing in the ocean at sunset. The boy on the left is leaning forward, and the girl on the right is standing. The background shows a hazy coastline with mountains under a warm, golden sky. A semi-transparent white box is overlaid in the center, containing the text.

# *Ongoing Services*

## **Advice & Coaching**



# *Partner With Us*

*Beyond one-off education, advice & coaching, we offer a transformational mentoring relationship.*

*Everyone longs for trustworthy mentors and trusted long-term partners. Our ongoing service provides guidance, support and accountability to stay on track towards your personal goals.*

***Allow us to partner with you as you move toward your best life!***



# Tailored Ongoing Relationships

## Choose your preferred style of support

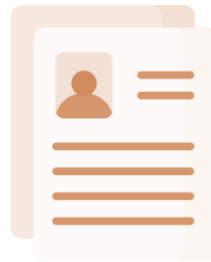
*Select the level and frequency of support that's best suited to you. All options include a minimum of annual life & wealth reviews, access to our client portal and complimentary access to our PA events.*



### Coaching Ongoing

*Quarterly Sessions*

✗ *Financial advice NOT included*  
*10% discount on additional PA Services*



### Advice Ongoing

*Quarterly or Annual Sessions*

✓ *Fee-free Additional Financial Advice*  
*15-20% discount on additional PA Services*



### Business Ongoing

*Monthly Sessions*

✓ *Fee-free Additional Financial Advice*  
*20% discount on additional PA Services*

# Ongoing Service Options

## 12-Month Renewable Plans

	COACHING QUARTERLY	ADVICE ANNUAL	ADVICE QUARTERLY	BUSINESS MONTHLY
	<b>\$220 / \$250 pm</b> or \$2,200 / \$2,500 pa	<b>\$350 / \$400 pm</b> or \$3,500 / \$4,000 pa	<b>\$500 / \$600 pm</b> or \$5,000 / \$6,000 pa	<b>\$1,000 pm</b> or \$10,000 pa
<b>Ongoing Service Features</b>			Coaching Included	Coaching + Advice Included
PA Client Portal Access + Resources	✓	✓	✓	✓
Complimentary access to PA Events	✓	✓	✓	✓
Annual Life & Wealth Review Meeting	1x 2hr pa	1x 2hr pa	1x 2hr pa	1x 2hr pa
Regular Coaching Check-ins	3x 1hr pa (quarterly)	✗	3x 1hr pa (quarterly)	11x 1hr pa (monthly)
Additional Personalised Coaching	up to 3hr pa	✗	up to 6hr pa	up to 12hr pa
Financial Product Admin Support	✗	✓	✓	✓
Included Financial Advice (SOAs)*	✗	✓	✓	✓
Discount on Additional PA Services**	10% off	15% off	20% off	20% off
	save up to \$670 pa	save up to \$1,650 pa	save up to \$5,870 pa	save up to \$9,450 pa

\*Additional advice fees might apply for complex advice matters (e.g. SMSF & multiple structures) \*\*PA Service Discounts can't be stacked with any other discounts



**PURPOSE  
ADVISORY**