

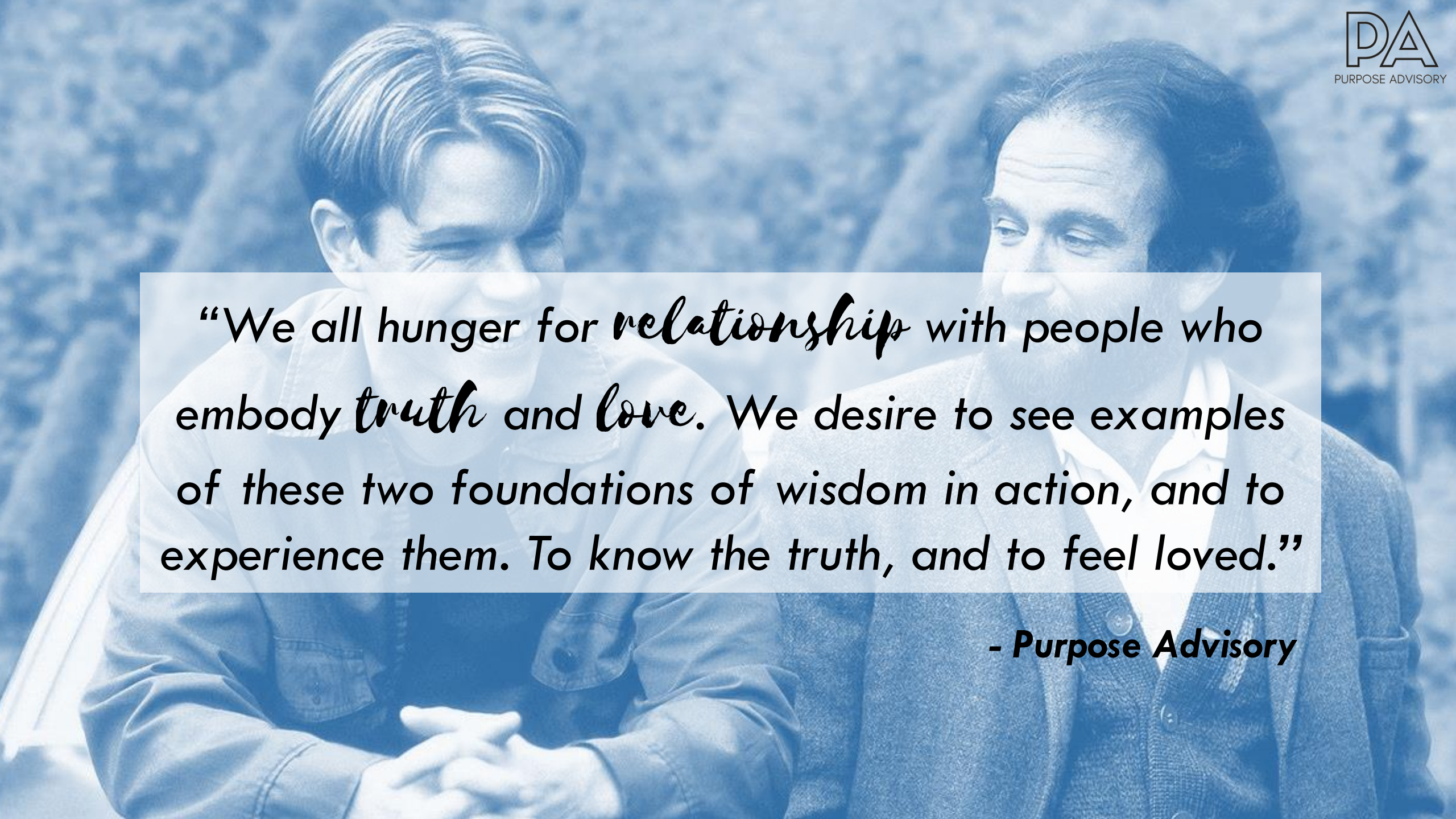


Services Guide

v3.0 - 1 Apr 2020

Our Mission

We help people to uncover their **true identity** and live in line with their unique **purpose** so that they experience deep **fulfilment** in their lives.



“We all hunger for *relationship* with people who embody *truth* and *love*. We desire to see examples of these two foundations of wisdom in action, and to experience them. To know the truth, and to feel loved.”

- Purpose Advisory

Our Clients Come to Us Feeling..



We Leave Our Clients Feeling..



**Clear on Their
Direction & Plans**



**Confident in their
Money Mindset**



**Healthy & Balanced
in Their Lifestyle**



**In Control of Their
Finances**



**Able to Build
Lasting Wealth**

Combining Life & Finances

Our Onboarding Process

Take advantage of our generous complimentary offer



Personal Coaching Sessions

We guide and empower you to kick goals in your life

Choose from a range of one-off coaching sessions which will guarantee you to take action on specific areas of your personal and financial life:



Personal Financial Advice

We tell you how to invest and what to do with your money

We provide advice on all manner of financial strategies and financial products. We can offer advice on all personal finance decisions you need to make, including super, insurances, various types of investments, debt management, salary packaging. We're your go-to professionals.



Group Coaching

Learn and grow with others and save

We host exclusive live events for small groups of 6 – 12 participants, where we combine our practical educational resources with powerful in-person coaching and interventions.



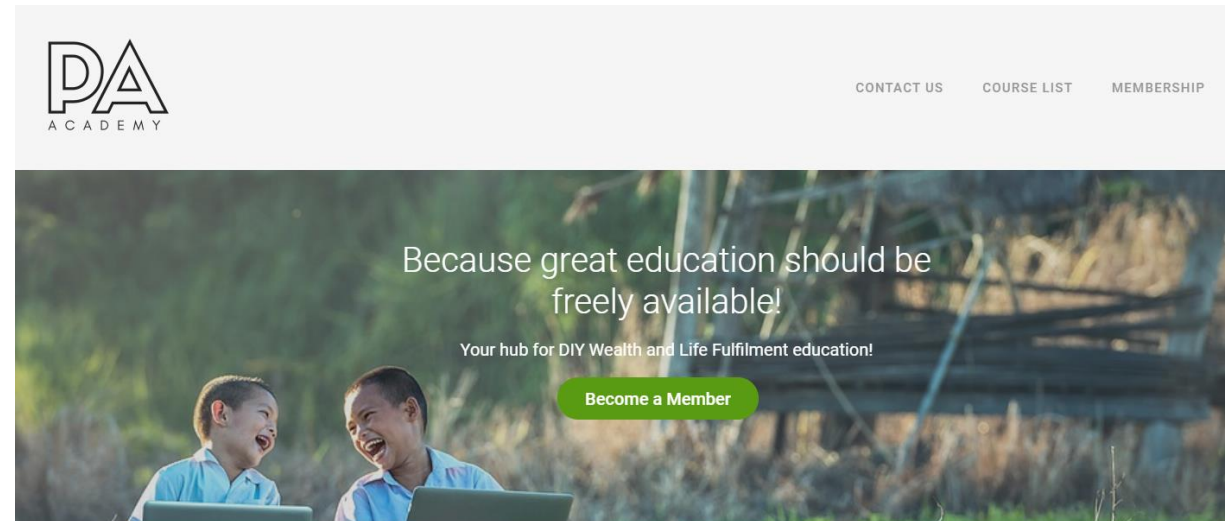
Practical Education

Learn important life lessons for planning and building wealth

Attend our live monthly workshop experiences and access your own personalised online learning platform with multiple bite-sized, practical education modules. Our education is hands-on, engaging and empowers you to feel more in control of your life and finances.



[Live Monthly Events](#)



[Free Online Learning Portal](#)

Intro Packages or PA Menu

Choose 'Pre-mixed' or 'Custom-mixed'

We've designed "Intro Packages" which address the challenges faced at different stages of your journey, and which include built-in value discounts. Start with one of our Pre-mixed options or choose your own Custom-mix from our services menu.



Intro Packages
'Pre-mixed'



PA Menu
'Custom-mixed'

A photograph of two young children in a kitchen. Both are wearing white chef hats and white aprons over blue and white striped shirts. The child on the left is smiling broadly and feeding the child on the right with a small spoon. The child on the right is also smiling and has a small amount of food on their chin. In the foreground, there is a table with various items including a plate of white powder, a bowl, and some bread. The background shows a kitchen setting with a window and lace curtains. A semi-transparent white banner is overlaid across the middle of the image, containing the text "One-off Services" in a black, cursive font.

One-off Services

Intro Packages

One-off Personalised Financial Advice & Coaching



Save \$240

Value Package

Cashflow
Cashflow Coaching &
Ongoing Support

\$890 / \$1,190
(incl. GST)



Save \$865

Value Package

Investment
Strategise for a Property
or Investment Purchase

\$2,490 / \$3,290
(incl. GST)



Save \$1,400

Best Value

Fulfillment
Holistic Life Planning &
Financial Advice

\$3,990 / \$4,990
(incl. GST)



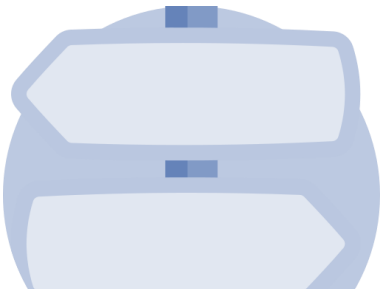



Learn in a Group

Purpose Experience
Life Planning & Financial
Coaching in a Group Setting

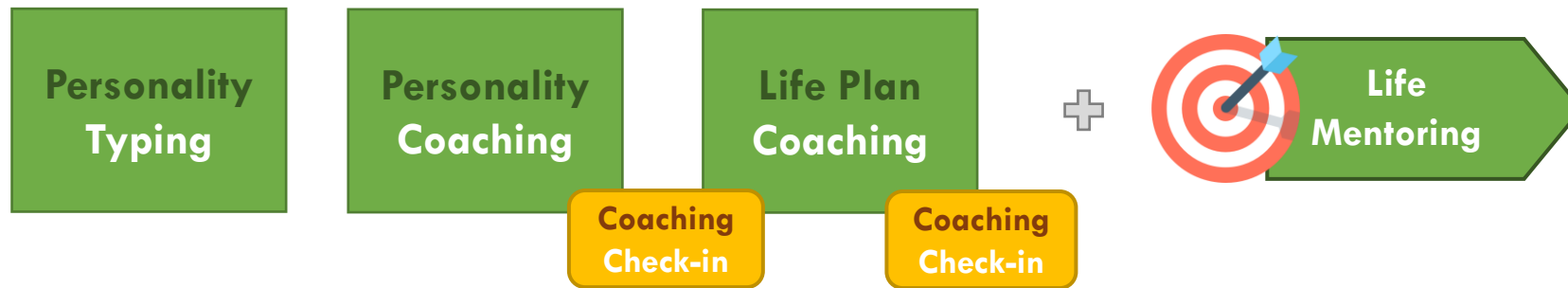
\$1,497 / \$1,997
(incl. GST)

Intro Packages

One-off Personalised Financial Advice & Coaching

 <p><i>Value Package</i></p>	 <p>Save \$240</p> <p><i>Value Package</i></p>	 <p>Save \$865</p> <p><i>Value Package</i></p>	 <p>Save \$1,400</p> <p><i>Best Value</i></p>
<p>Direction Personality Typing, Life Coaching & Planning</p>	<p>Cashflow Cashflow Coaching & Ongoing Support</p>	<p>Investment Strategise for a Property or Investment Purchase</p>	<p>Fulfillment Holistic Life Planning & Financial Advice</p>
<p>\$790 / \$990 (incl. GST)</p>	<p>\$890 / \$1,190 (incl. GST)</p>	<p>\$2,490 / \$3,290 (incl. GST)</p>	<p>\$3,990 / \$4,990 (incl. GST)</p>

“Direction” Package



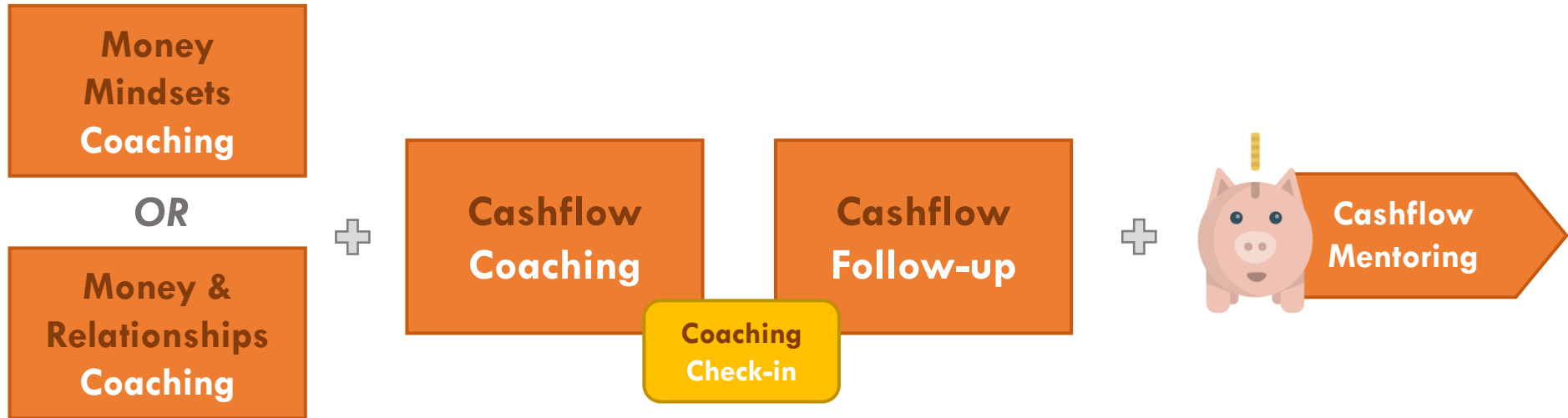
Key Outcomes:

- Discover your unique, objective personality
- Get coaching to bring your personality results to life
- Create a 10-year vision for your life
- Review your beliefs and life habits
- Set up financial milestones and short-term goals
- Access ongoing support and accountability to achieve your goals

Single - \$790 (incl. GST)
Couple - \$990 (incl. GST)
Payable upfront

+ \$50pm (incl. GST)
Paid monthly, cancel any time

"Cashflow" Package



Key Outcomes:

- Upgrade your money mindset / work better as a financial team
- Create an automated cashflow plan with a digital tracking app
- Start a savings plan that works, which you can rely on
- Optimise your banking to minimize stress and time spent

Single - \$890 (incl. GST)
Couple - \$1,190 (incl. GST)

Payable upfront

+ \$30pm (incl. GST)

Paid monthly, cancel any time

"Investment" Package



Key Outcomes:

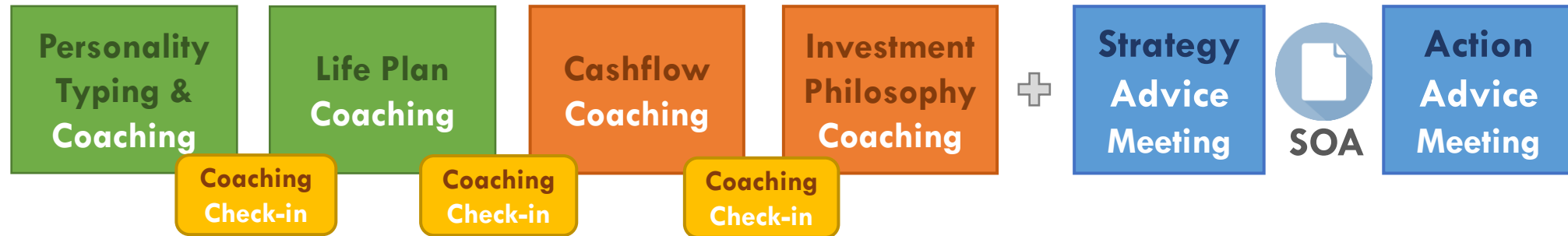
- Get upskilled on investing and clarify your investment philosophy
- Refine your investment portfolio or property preferences & plans
- Address financial risks & sort out your personal insurances
- Get personalised investment advice for building wealth

Single - \$2,490 (incl. GST)
Couple - \$3,290 (incl. GST)

*Deposit: \$880 payable upfront
 Balance payable after delivery of advice*



“Fulfilment” Package



Key Outcomes:

- Discover your unique personality & refine your core beliefs
- Create a 10-year vision, financial milestones and short-term goals
- Implement a stress-free, automated cashflow plan
- Design a tailored investment philosophy to guide your decisions
- Take strategic steps to increase your income
- Implement a wealth plan, including investments, super & insurances

Single - \$3,990 (incl. GST)

Couple - \$4,990 (incl. GST)

Deposit: \$1,990 / \$2,290 payable upfront
Balance payable after delivery of advice

"Purpose Experience"



Rethink your
Beliefs & Purpose



Reimagine your
Life Vision



Redesign your
Cashflow



Revitalise your
Income



Discover your
Personality



Refine your
Money Mindset



Wealth Creation
Investments



Risk Management
Personal Insurances

Key Outcomes:

- *Build a clear Life Plan*
- *Begin creating a Wealth Plan*
- *Leave feeling inspired and confident about your direction*
- *Take decisive action towards your vision and goals*
- *Access coaching support*
- *Learn alongside an intimate group of likeminded peers*

Single - \$1,497 (incl. GST)
Couple - \$1,997 (incl. GST)

*Payable in advance
Payment plans available upon request*

PA Menu Pricing

	Life Coaching	Price
<input type="checkbox"/>	Personality Typing + Coaching Session	\$440
<input type="checkbox"/>	Life Plan Coaching Session	\$440
<input type="checkbox"/>	Personal Admin Coaching Session	\$440
<input type="checkbox"/>	Life Coaching (per 50min)	\$220
	Finance Coaching	Price
<input type="checkbox"/>	Cashflow Coaching Session	\$440
<input type="checkbox"/>	Money & Relationships Coaching Session	\$440
<input type="checkbox"/>	Investment Philosophy Coaching Session	\$440
<input type="checkbox"/>	Property Coaching Session	\$440
<input type="checkbox"/>	Business Coaching Session	\$440
<input type="checkbox"/>	Share Trading Coaching Session	\$440
<input type="checkbox"/>	Risk & Insurance Coaching Session	\$440
<input type="checkbox"/>	Wealth Plan Review Meeting	\$660




	Financial Advice	Single	Couple
<input type="checkbox"/>	Insurance Advice	\$1,390	\$2,055
<input type="checkbox"/>	Superannuation Advice	\$720	\$1,110
<input type="checkbox"/>	Investment Portfolio Advice	\$940	\$1,110
<input type="checkbox"/>	Investment Bond Advice	\$1,210	\$1,760
<input type="checkbox"/>	Add-on: Geared Investment Advice	\$610	\$835
<input type="checkbox"/>	Salary Packaging Advice	\$550	\$825
<input type="checkbox"/>	Debt Management Advice	\$1,110	\$1,230
<input type="checkbox"/>	Business Succession & Insurance Advice	\$1,610	\$2,505
<input type="checkbox"/>	Holistic Wealth Creation Advice (Super, Insurance & Investment Advice)	\$2750	\$3,750

	Finance Education	Price
<input type="checkbox"/>	Online education modules	Free
<input type="checkbox"/>	Education & Coaching Check-ins	\$110







Mentoring Services

Life Mentoring Options

	 Life BASICS \$50 pm or \$540 pa	 Life INCREASE \$200 pm or \$2,160 pa	 Life ACCELERATE \$400 pm or \$4,320 pa
Annual 'Life Plan' Review Meeting	2hr pa	2hr pa	2hr pa
Regular Life Coaching Sessions	30min per quarter	50min per month	50min per fortnight
PA Life Plan, Goals & Task Tracking System	✓	✓	✓
Unlimited Chat Support	✓	✓	✓
Discount on PA Coaching Services*	20% Off	30% off	50% off

Note: Life Mentoring options can be combined with Wealth Mentoring. *Coaching discounts do not stack with other discounts.

Wealth Mentoring Options

	 Plus: CASHFLOW	 Wealth BASICS	 Wealth INCREASE	 Wealth FAST-TRACK
	\$30 pm or \$300 pa	\$50 / \$75 pm or \$540 / \$810 pa	\$200 / \$250 pm or \$2,160 / \$2,700 pa	\$300 / \$350 pm or \$3,240 / \$3,780 pa
Cashflow Tracking Software	✓	-	-	-
Quarterly Cashflow Reports	✓	-	-	-
Annual 'Wealth Plan' Review Meeting	-	✓	✓	✓
Financial Coaching Check-ins	-	Up to 2x 30min pa	Up to 2x 1hr pa	Up to 4x 1hr pa
Discount on PA Coaching Services	-	20% Off	30% off	50% off
100% Product Commission Rebates	-	✓	✓	✓
Unlimited Chat Support	-	-	✓	✓
Complimentary Advice SOAs	-	-	1x Standard Advice	2x Complex Advice
Free Financial Coaching Sessions	-	-	-	1 x pa

