

Onboarding

SINGLE

COUPLE

Fact Finding Meeting **1.00**

Strategy Meeting **0.50**

Initial Research **1.50**

Fact Finding Meeting **1.00**

Strategy Meeting **1.00**

Initial Research **2.00**

Advice

Research & Modelling **1.50**

Document Creation **1.00**

Advice Presentation **0.50**

Research & Modelling **2.00**

Document Creation **1.50**

Advice Presentation **1.00**

Implementation

Applications & Forms **0.50**

Document Follow Up **1.00**

Implementation -
Standard Processes **0.50**

Applications & Forms **1.00**

Document Follow Up **1.50**

Implementation -
Standard Processes **1.00**

TOTAL HOURS **8.00**

@ \$275/hour **\$2,200**

TOTAL HOURS **12.00**

@ \$275/hour **\$3,300**

WE REQUIRE A 20% DEPOSIT FOR ADVICE, WITH REMAINING AMOUNT PAID OVER 12 MONTHLY INSTALMENTS.

DEPOSIT: \$440.00
MONTHLY: \$146.66

DEPOSIT: \$660.00
MONTHLY EACH: \$110