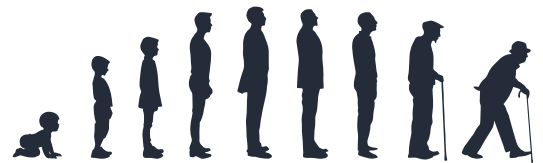


LIVE Your Best Life

Who you are:

You are hard-working, goal-oriented and have big dreams for yourself and your family. You want to partner with a trusted professional who will help you in building wealth and guide you on your journey towards financial independence.



Typical Stage of Life:

- Prosperous 35-50 Year Olds
- Reflecting 50-60 Year Olds

Financial Assets: \$500K - \$2MM or
Household Income: \$450,000+

What you get:

Comprehensive Financial Plan tailored to your needs and designed to give you the best chance of achieving your objectives.

Specialised ongoing guidance on all facets of your financial life, driven by semi-annual progress meetings and a range of informal touchpoints.

Your ongoing partnership covers: Wealth Accumulation Planning, Regular Progress Tracking, Financial Wellbeing, Estate Planning, Investment Management, Risk Management, Debt Management, Education (see next page for more detail).

Minimum Ongoing Fee: \$7,000 p.a. (Plus GST)

LIVE
Your Best Life

Services:



Wealth Accumulation Planning – Advice on how make the most of your biggest asset: your future income. We help you find a balance between the short-term (living expenses, school fees, tax, debt repayments) and long-term (building wealth, financial independence, financial wellbeing) to ensure you are set up for success.



Regular progress tracking - To ensure your plan remains appropriate and that you are on target. If something changes in your life, we'll adjust your strategies accordingly.



Financial Wellbeing – Access to Strategy First's Financial Wellbeing programme, which will include sessions designed to uncover your personal values and track progress towards them.



Estate Planning – estate planning discussions involving your solicitor to develop and implement an estate planning strategy.



Investment Management – Access to Strategy First's Investment Committee and Core portfolio solution. Guidance and coaching that allows you to cut through the noise and focus on your long term portfolio goals.



Risk Management – As required, we will liaise with a specialist insurance adviser to achieve a portfolio of personal insurances targeted to your needs.



Debt Management – As required, we will liaise with a specialist debt adviser/broker to ensure your financing needs are met.



Education – Access to educational material and regular content created by Strategy First's Advice Team and Investment Committee.