Strategyfirst
INDEPENDENT FINANCIAL ADVICE

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PRICING COMPARISON

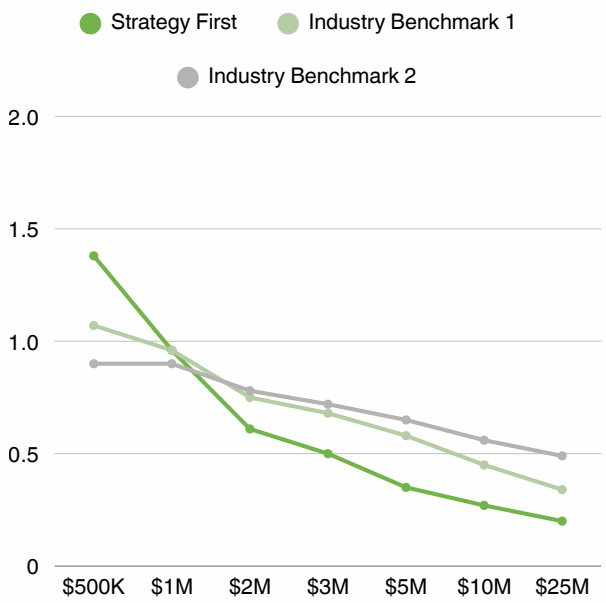
How does Strategy First's Ongoing Service Fee compare to the industry benchmark?

We charge a flat advice fee, which is why our costs are slightly higher for smaller balances (our fees have been converted to equivalent percentages to make for an easy comparison).

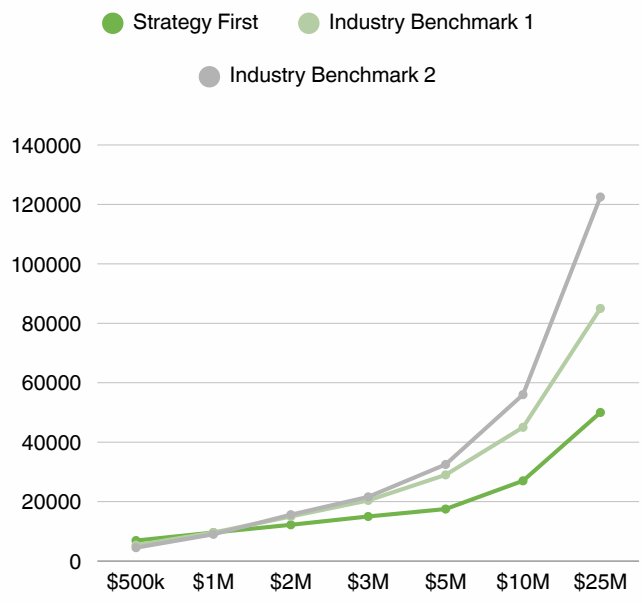
Strategy First's fees cover more than just investment management, they cover comprehensive strategic and wealth management advice.

As the portfolio balance grows, Strategy First's flat fees become significantly more cost-effective than the market.

Cost (%)



Cost ($)



Cost saving / increase compared to industry average ($)

Asset Balance	Strategy First vs Benchmark 1	Strategy First vs Benchmark 2
$500k	-$1,550	-$2,400
$1M	$0	-$600
$2M	$2,800	$3,400
$3M	$5,400	$6,600
$5M	$11,500	$15,000
$10M	$18,000	$29,000
$25M	$35,000	$72,500

Sources
Strategy First - Strategy First Pricing Policy (2025)
Industry Benchmark 1 - Dimensional Fund Advisers Global Adviser Study, Aus & NZ metric only (2025)
Industry Benchmark 2 - The Principals Community Business Insights (2025)