Take Control - With Your Independent Financial Adviser

Client Value Proposition

- "We partner with clients to achieve their financial goals by helping them understand what they have, where they are going and how to get there."

About Rise Financial

- Established in 2004 and operating under the Australian Financial Services Licence (AFSL) number 311718.
- A truly independent financial planning business with the licensee, Phil Thompson, owning 100% of the business.
- We operate on a purely "fee for service" basis, which means that we only charge agreed flat fees for the services we provide.
- Rise Financial is a recognized Professional Practice of the Financial Planning Association.

About Phil Thompson

- Phil has been working as a financial planner since 1996 and started Rise Financial in 2004 to provide truly independent financial advice on a purely fee for service basis.
- Qualifications include a Bachelor of Commerce, a Diploma of Financial Planning, a Master of Management, is a Certified Financial Planner and is a long standing member of the Financial Planning Association which includes receiving a Distinguished Service Award.
- Phil wrote a weekly column in the Canberra Times from 2005 to 2013 providing answers to readers' questions.
- Phil has also been honored by Queen Elizabeth II with a Bravery Medal.

Specialising In

- Wealth creation.
- Lifetime planning / Retirement planning.
- Investment advice, implementation and management.
- Event advice including Redundancy, Inheritance and Financial Separation.

Advice Process

Step 1

Financial Check Up / Consultation / Salary Packaging Advice

- To help you understand '*Where You Are*' financially.

$330 *(inc. GST)*

Optional Extra – Financial Projection

- To help you understand '*Where You Are Going*' with 1 financial projection.

Additional **$165** *(inc. GST)*

Step 2

Strategic Financial Plan

- To help you understand '*Where You Could Go*' with multiple financial projections.

$2,640 *(inc. GST)*

Step 3

Statement Of Advice

- To help you understand '*How To Get There*' by setting your planned financial direction and strategy, and providing specific recommendations for action, with any recommended financial product implemented at a cost of $330 (inc. GST) per policy.

$1,650 *(inc. GST)*

Step 4

Wealth Management Service

- To allow us to '*Take You There*' on your financial journey with ongoing financial advice and investment management.

$3,300 *annually (inc. GST)*

Notes – *Above fees may increase for more complicated situations or where greater advice risk is involved.*

– *Above fees are correct at the time of preparation – February 2018.*

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