

CURRENT FEE STRUCTURE

The following fee structure is merely a guideline.

All fees and/ or commissions payable, will be agreed to prior to any instruction.

Compiling a Retirement / Financial / Risk / Estate – Plan: R1,000.00 per hour (negotiated

with client prior to engagement)

Analysing and recommending suitable solutions: R 1,000.00 per hour

Admin services: R 850.00 per hour

Processing instructions, submitting it to product providers, follow-ups, policy schedules, etc.

Preparation of Insurance / Portfolio summary: 1 per annum = Free of charge;

Thereafter R 850.00 per hour

Annual Review of Implemented Plan: 1 Review included in annual

advisory fee charged against

investment.

(Excluding Risk & Estate plans) More than one review p.a.

R 1,000.00 per hour per review

Associated partners fees:

To be negotiated depending

on nature of service required

All other fees: To be negotiated on

instruction depending of nature of work involved

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