



## Plans Plus Lite (Offshore)

### Price Guide

May 2025

SoA Type/Entities	RoA	Risk Only	Simple	Standard
Single	\$100	\$220	\$250	\$400
Couple	\$125	\$275	\$300	\$450
Multiple Entities	\$175	\$315	\$325	\$500

Task	Cost (in addition to the above fees)
Risk Researcher (per client)	\$50
WealthSolver (per client - up to 3 alternative products)	\$50
Financial Modelling/Projections (single/couples only)	\$125

\*\* All prices exclude GST

#### Risk Only SoAs

- Insurance recommendations only

#### Simple SoAs

- Maximum 4 strategy issues (eg: super rollover, salary sacrifice, NCCs & estate planning)

#### Standard SoAs

- Maximum 6 strategy issues (eg: super rollover, salary sacrifice, NCCs, insurance, non-super investment & estate planning)

Please note that applicable fees will be confirmed prior to commencement of work in relation to any SoA requests submitted to Plans Plus.