



Plans Plus Premium Fee Schedule May 2025

Base SoA

Base SoA does not include any number-crunching, such as cashflow, tax or portfolio value projections.

Number of Entities *	1	2	>3
Cost (excl GST)	\$550	\$650	POA

* A couple is considered a single entity for the purposes of calculating fees.

Modelling

First Entity

Projection Period	1 yr only	2-5	6-10	11-20	>20
Cost (incl GST)	\$150	\$200	\$225	\$250	\$300

Additional Entities (per additional entity)

Projection Period	1 yr only	2-5	6-10	11-20	>20
Cost (incl GST)	\$125	\$150	\$200	\$225	\$250

The above costs cover modelling for up to 2 scenarios, one of which may (or may not) be the clients' current position.

Where more than 2 scenarios are to be modelled, Plans Plus fees will be confirmed prior to work being commenced.

Plans Plus will provide a written quote for your approval in all cases prior to commencing work.

Plans Plus reserves the right to vary the above fees in instances where it believes that the level of work required in a particular case warrants additional fees.

Indicative Fee Matrix

Modelling Period / Entities	None	1 Yr	2-5yrs	6-10 yrs	11-20 yrs	>20 yrs
Single Entity *	\$550	\$700	\$750	\$775	\$800	\$850
Two Entities (eg: Couple + SMSF)	\$650	\$925	\$1,000	\$1,075	\$1,125	\$1,200
More than Two Entities	Price on Application					

* A couple is considered a single entity for the purposes of calculating fees.

^ All fees exclude GST.