



CU Financial Planning

Terms of Engagement

This letter is to confirm our understanding of the **Terms of Our Engagement** and the nature and limitations of the services that we provide.

Purpose and Scope of Advice

- Review of your existing Superannuation funds and or SMSF & Underlying Investments
- Review existing investments outside Super
- Review wealth protection – assets and family ex. Life Insurance, Income Protection
- Consider risk profile and asset allocation
- Develop a plan for wealth creation and retirement funding to meet clients stated objectives.

Initial Strategy Fees – (fee for service)

Based on an estimation of time required, the fee will be **\$2,200 (+ GST)**

This fee will cover the following:

- Research on existing superannuation/Pension funds/Annuities
- Research on existing investments
- Research on proposed insurance providers
- Development of an appropriate strategy based on your stated circumstances, risk profile and needs.
- Preparation of Statement of Advice
- One hour meeting to discuss recommendations/online consultation

Confirmation of Terms

Please sign to indicate that it is in accordance with your understanding of the arrangements.

_____ (Date)