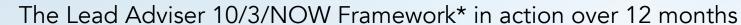
CASE STUDY CLIENT ENGAGEMENT





	INITIAL MEETING	ENGAC	2 ND YEAR										
		1	2	3	4	5	6	7	8	9	10	11	12
EFORE EAD ADVISER	FSG No charge	SOA & FACT FIND SECOND MEETING ADVICE ACCEPTED \$2K for advice may be charged in month 4 or 5					1.1% ASS BASED F COMME	EES			ar based o	n 1M FUM	\$11K FUM based fee (1MIL)
FTER EAD ADVISER	10-3-NOW FOUR L'S FSG Client agrees to engage. \$1.5K per month professional fee to proceed.	GETTING CLIENTS LIFE WELL ORGANISED LEAD ADVISER FRAMEWORKS \$1.5K p.m. professional fee for service				O USING	COMME	S FOR PERSONAL FINANCIAL ADVICE INCES m. professional fee for service				LIFE PLAN IS IN PLACE \$1.5K \$18K first year – professional fee for service	LEAD ADVISER ACTING AS CFO ON THE FAMILY BOARD \$18K yearly ongoing fee - not tied to portfolio but based or professional fee



Help Articulate and Define What makes a great Life for the Family



Collate and Understand all the Assets of the Family



Help Design a **Strategic Life Plan** for the Family



Coordinate a Best of Breed Team to Assess and Embed a **Continuing Risk Plan** for the Strategic Life Plan



FUM is not the leading indicator for clients, it's getting their life in order that counts.

PERTH PRACTICE
TWO OFFICES

*The Lead Adviser frameworks apply to clients with complex needs. For more information visit leadadviser.com.au