

# I-Plan Financial Planning

Guide for Referral Partners on our Full & Limited Advice Services



I-Plan Financial Planning (I-Plan) has been created to provide Accountants, Finance Brokers, Property Specialists and other intermediaries with the opportunity to offer their Clients a truly holistic advice service across all asset classes - including direct property investment. It also allows our Advisors greater flexibility to choose from a broad range of product and service providers.

This is a service that is sorely lacking among many Dealer Groups due to the self-interest of large Insurance Companies and the Big Banks.

**Contact us today** for more information if:

- Your Client requires a comprehensive Statement of Advice that considers their total financial position across all available asset classes

**OR**

- Your Client requires 'Limited Advice' for Insurances only

**[www.iplanning.com.au](http://www.iplanning.com.au)**

**Sydney: 02 8004 0209    Adelaide 08 8464 0818    Perth 08 6465 4747**  
**Brisbane 07 3333 1949    Melbourne 03 9095 8668    Newcastle 02 4958 1835**

## Pricing (GST incl):

- Full Statement of Advice = \$2,750
- Limited SoA ~ Insurance = \$500



**HNW**  
PLANNING

*I-Plan Financial Planning Pty Ltd, a wholly-owned subsidiary of the I-Financial Group, and an authorised representative of HNW Planning Pty Ltd, AFSL 225216 (ABN 42 083 745 055)*

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