

I-Plan Financial Planning

Guide for Referral Partners on our SMSF 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.

I-Plan specialises in Self Managed Superannuation Funds (SMSF) and has a particular emphasis on supporting the needs of

SMSF specialists. Together with its 'sister company' [SMSF Loans](#), I-Plan is uniquely positioned to take advantage of the many tax-effective and leveraged strategies available to SMSF Trustees and their Advice Teams.

Contact us today for more information if:

- Your Client has a SMSF
- Your Client is thinking of establishing a SMSF
- Your Client is interested in leveraging into property through their SMSF

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):

- SMSF Statement of Advice (SoA) = \$2,750
- Limited Advice - existing SMSF requiring advice regarding leverage = \$1,650

Prices include referral to SMSF Loans for Lending transaction and to finalise settlement of associated loan at no additional cost[#].

[#] Lenders normal Fees and Charges apply.



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