

Pricing & Creating Platform

(Version 2024 07 05)

Pricing

The first 14 days are free so that you can either test the system with “fake” or “real” clients at no charge.

After the first 14 days, fees are charged per **Advice Episode** which is limited to a period of 2-months.

There are two fee structures:

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|-----------------------------------|--------------------------|
| 1. Lite Plan (limited to 5 years) | \$100 per Advice Episode |
| 2. Standard Plan (5 – 50 years) | \$175 per Advice Episode |

Each company will be billed at the end of year month, based on the number of Advice Episodes generated.

The aim of *Advice Online* is meet the government’s desire that Financial Advisers and Superannuation Funds provide low-cost advice to the community.

With the announcement of the second advice category of Qualified Adviser and the inclusion of Insurance Funds and Banks, Advice Online can also be used for these new inclusions.

We believe that **Advice Online** can deliver to all.

How to create your customised platform

There are two methods:

1. **Agreement to Terms and Conditions** on application Advice Online. Simply contact Glenis Phillips and provide the name of the Administrator for your company and a link will be sent for you to create your company’s platform. See the details in the **Onboarding Process**. Please provide the following information:
 - a. Name and email of Administrator
 - b. Name and email of person to receive billing information at the end of each month.
2. **Signed Agreement** for those companies who prefer a formal contract, please advise, listing the name of the Administrator who is authorized to sign the document. The document will be completed and forwarded to for electronic signing. Please provide the following information:
 - a. Name and email of Administrator
 - b. Name and email of person to receive billing information at the end of each month.

Contact Information

Please talk to Glenis Phillips SF Fin, the designer of Advice Online to discuss your requirements for both your company’s provision of services and fees appropriate to those services.

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