

2021 Service Fees

| Financial Needs Analysis | |
|---|------------------|
| Financial & Investment Planning: Basic | R6,000 |
| Financial & Investment Planning: Advanced | R9,600 |
| Hourly Consultation Fees | |
| Key Person – Estelle CFP® | R4,000 |
| Senior Consultant | R2,500 |
| Representative | R500 |
| Tax administration | |
| Income Tax Registrations (Individual) | R 860 |
| Basic Tax Return | R 840 |
| Tax Return with car allowance | R 1,400 |
| Tax Return, calculation of deductions as well as car allowance | R 1,560 |
| Provisional Tax Return (IRP6 Form) | R 510 |
| Provisional Tax – “nil” return (no calculations made) | R 210 |
| Pensioner Rates (any tax returns) | R 510 |
| Request income tax certificate / tax clearance / good standing (for existing tax client only) | R 1,750 |
| Admin fees: Insurance Products per policy | |
| Maturity | R 330 |
| Cancellations / Surrenders | R 330 |
| Updating of Assurance Portfolio - per policy / investment | R 120 |
| Policy Amendments (without commission earnings) | R 520 |
| Any admin request not mentioned | To be negotiated |
| Address changes – all companies | R 120 |
| Change of Beneficiary | R 120 |
| Application for Policy Loan | R 275 |
| Wills (administration / drafting) | To be negotiated |
| Wills (amendments) | To be negotiated |

Note:

- All fees are inclusive of VAT – We reserve the right to request a deposit
- Fees are adjusted by CPI on an annual Basis