

## 2023 Service Fees

Financial Needs Analysis	
Financial & Investment Planning: Basic	R6,670
Financial & Investment Planning: Advanced	R10,600
Hourly Consultation Fees	
Key Person – Estelle CFP®	R4,500
Senior Consultant	R2,800
Representative	R555
Tax administration	
Income Tax Registrations (Individual)	R 950
Basic Tax Return	R 930
Tax Return with car allowance	R 1,560
Tax Return, calculation of deductions as well as car allowance	R 1,740
Provisional Tax Return (IRP6 Form)	R 560
Provisional Tax – “nil” return (no calculations made)	R 230
Pensioner Rates (any tax returns)	R 550
Request income tax certificate / tax clearance / good standing (for existing tax client only)	R 1,950
Admin fees: Insurance Products per policy	
Maturity	R 370
Cancellations / Surrenders	R 370
Updating of Assurance Portfolio - per policy / investment	R 135
Policy Amendments (without commission earnings)	R 580
Any admin request not mentioned	To be negotiated
Address changes – all companies	R 130
Change of Beneficiary	R 130
Application for Policy Loan	R 305
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