



Simple Super

Our down-to-earth, personalised service and tailored wealth solutions enrich your life

I need to get the most out of my super upon retirement without compromising my lifestyle of today...

TGFS Financial Planning specialise in pre and post retirement financial planning for people who want peace of mind and the freedom to live a fulfilling and prosperous life.

Our Simple Super package is designed for clients who take more than just a passing interest in creating wealth for retirement and have up to \$400K in superannuation. TGFS Financial Planning will provide comprehensive advice to empower clients in making informed decisions for now and into their financial future.

TGFS Financial Planning – Simple Super Package

TGFS Financial Planning Service Offering	Retirement Ready
Annual review of your portfolio and financial plan with recommendations in relation to changes to your investments or strategy where appropriate	Via Email Only
Annual asset valuation and sector allocation reports	Yes
Quarterly newsletters outlining economic commentaries and legislative updates	Yes
Annual formal review meeting	Yes
Introduction to other Professional Services	Yes
✓ Will and Estate Planning referral service	Yes

For more information on how TGFS Financial Planning can “enrich your life”, call us on 1300 755 521.

TGFS Financial Planning
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This material is current as at September 2013 and may be subject to change. This material has been prepared by TGFS Financial Planning, a Corporate Authorised Representative of Consultum Financial Advisers Pty Ltd, ABN 65 006 373 995, AFSL 230323.

Cost

1.1% of your superannuation balance. Paid monthly from your superannuation fund unless other method of payment is selected