



Paraplanning Request

Please complete the following questions and include this document in your paraplanning submission.

Advice Summary

Have you provided an FSG to your client(s)?

If yes, when did you provide this?

Please provide details of the client meeting

What are the client's goals?

What was the recommended strategy?

How will the client be better off because of your advice?

Provide an Alternative Strategy

Where will the client be without your advice?

Who's implementing the advice?



Please complete the below additional requirements if you are providing advice for LRBA, Pension and/or SMSF establishment strategies.

SMSF Establishment Requirements

Before submitting your paraplanning request, please complete and attach the following:

- Fact Find
- Annual 12-month super statements

SMSF details and costs			
Name of proposed SMSF *		Advice fee *	\$
Trustee Type *		Implementation fee	\$
Name of the Corporate Trustee (if applicable) *		Trustee Company *	\$
Compliance Costs – Auditing, tax returns *	\$	Superfund Deed *	\$
Ongoing Advice fee (if applicable)	\$	Other fees (if applicable)	\$

LRBA requirements

Before submitting your paraplanning request, please complete and attach the following:

- Fact Find
- Member statements

Property details and costs			
Purchase price of the property *	\$	Bare trust name *	
Stamp duty *	\$	Bare trust *	\$
Loan to value ratio (up to 70) *	%	Bank fees	\$
Loan Term *	Years	Documentation costs	\$
Loan Term- Interest only period	Years	Other costs	\$
Interest rate (%) *	%	Annual expenses on the property (Include rates, audit fees, etc and exclude interest repayments) *	\$
Expected net rental income (p.a.) *	\$		

Pension requirements

Before submitting your paraplanning request, please complete and attach the following:

- Fact Find
- Member statements

Pension details		Commutation details	
Pension Type *		Amount to commute *	\$
Purchase Price *	\$	Commute to *	
Minimum Payment	\$	Adjusted Pension Balance *	\$
Maximum Payment	\$	Recommended Pension Balance *	\$
Recommended Payment *	\$		
Pension Start Date *		Lump Sum Withdrawal Amount	\$

*Mandatory items