

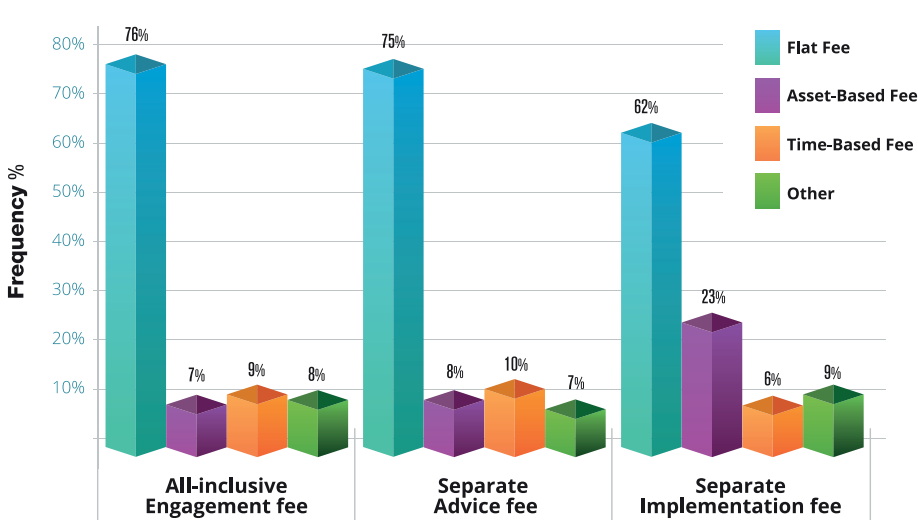
ADVISER PRICING MODELS INSIGHTS

A FEW HIGHLIGHTS FROM THE ADVISER PRICING MODELS RESEARCH REPORT

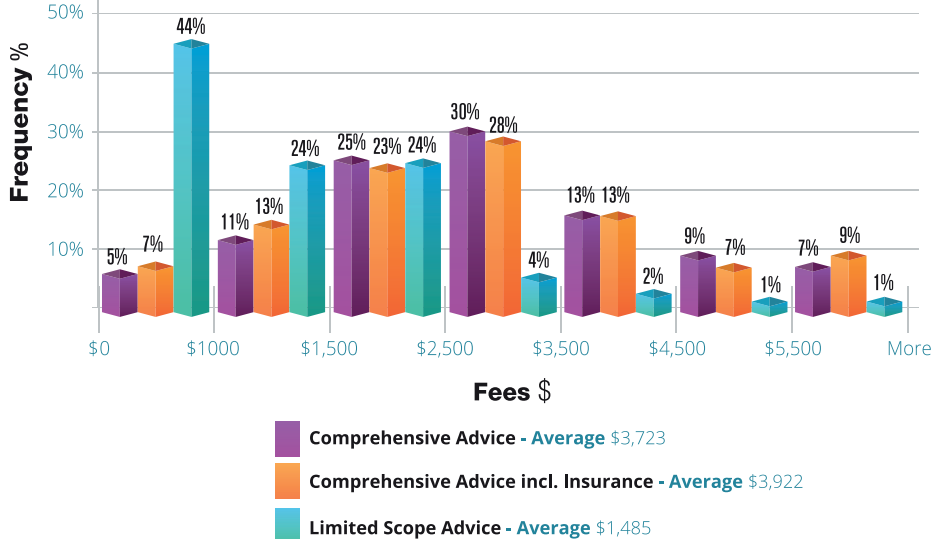
THIRD EDITION

275 ADVICE BUSINESSES
AROUND AUSTRALIA
(plus a couple from the US and Canada)

Of the 91.4% who charged an upfront fee,
the following models were used:



Engagement Fees other than Insurance-only advice:



30

Number of participants who get
paid fees for insurance-only advice
AND TAKE NO COMMISSIONS.

4 received then refunded all commissions,
26 wrote policies with nil commissions.



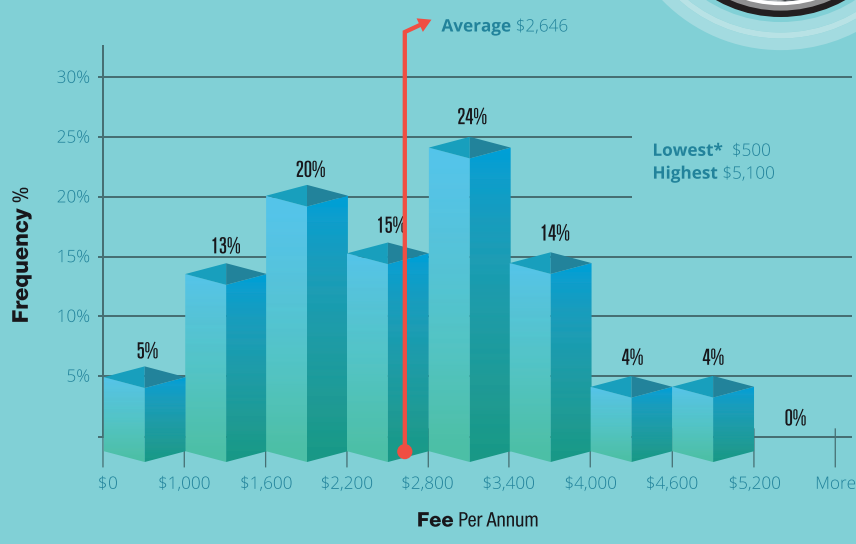
\$171

average
paraplanner
charge-out rate

CASE STUDY 2/5

Joe & Tina - Ongoing Fees

Assuming the adviser will manage \$330,000 FUA:



*Lowest fee other than those who charged nil up front and put client on an ongoing monthly fee immediately.

14% of participants stated that they wouldn't take Joe and Tina on as clients (not in their target market.)

47%

will decrease or offset
their fee when they receive
insurance commissions.

3%

The amount of info
this infographic covers.

CLICK HERE to purchase the
ADVISER INSIGHTS VERSION

or the **FULL**

Adviser Pricing Models Research Report