

PRIVATE WEALTH SERVICE

FEE TIERS

Portfolio Tier	Service Fee + Brokerage	Full-Service Fee (No Brokerage)
First \$1 million	0.85% p.a.	1.25% p.a.
Next \$2 million	0.55% p.a.	0.80% p.a.
Next \$4 million	0.44% p.a.	0.55% p.a.
Balance over \$7m	Agreed with adviser based on portfolio complexity	
Min. Service Fee	\$4,000 p.a.	\$6,000 p.a.
Notes	Fees include GST. Brokerage is payable per trade.	Fees include GST.

