

Fee Schedule

We are a fee based Financial Planning firm that offers various payment options for work undertaking. The basis of payment is agreed in advance and clearly disclosed in writing prior to any service commencing.

What is Remuneration?

Remuneration is the payment earned by the intermediary for work undertaken on behalf of both the provider and the consumer. The amount of remuneration is generally related to the scope of the work agreed, including any implementation and ongoing advice.

Types of Remuneration

Fee Option

Our fees will be based on a combination of time needed to complete the required work, the complexity of the case and the specialist knowledge required. Fees are not predicated on a product implementation and are subject to VAT.

Commission Option

Commission is where third party insurers or product producers can remunerate Wealth Alliance for work undertaken through the product implementation process. When applicable, summary details of these payments will be included in a product information document provided to clients in advance of any application or proposal forms being agreed or completed. These will be detailed in your Policy providers document schedule including notification of any cooling off periods applicable.

Effective Date: June 2024