



# Personal Planner

The Flowers Personal Planner retainer has been designed to help busy medical and dental professionals achieve lifestyle goals by making your money work for you in the limited time you have.

The 'Planner' is ideal for those looking for expert financial advice in wealth creation, risk management, legal, finance and taxation.

- Your retainer will include the following financial management services:
- Completed tax return
  - Review of current financial position or existing financial plan
  - Preparation of strategic plan / financial plan, (includes identifying or reviewing short, medium and long term goals and determining a plan to achieve these goals) \*

*\*Additional charges apply depending on individual strategies recommended, complexity and time taken to complete.*

The minimum retainer fee for Personal Planner clients is \$1100\* and provides you with access to the many benefits offered to Flowers clients, including:

### Personal Financial Team

As a client of Flowers, you receive a personal team of professionals dedicated to your financial health. Your Financial Manager orchestrates all your financial affairs by diagnosing your financial needs, prescribing specialist treatment, then coordinating a team of specialists in the investment, risk, tax, accounting, property and legal fields, all focused on structuring your finances to maximize your financial position and achieve your lifestyle goals.

### Integrated Financial Model

The Flowers Way model is recognised as the most comprehensive financial offering to medical and dental professionals on the market. We see the complete financial picture. All your financial needs are in one place, enabling you to create, protect and enjoy your wealth in a way that is time efficient and cost effective.



To take advantage of our Personal Planner services, call Flowers today on 1800 26 36 46