SHARTRU WEALTH

Why Shartru Wealth?

Shartru Wealth Management (SWM) has 4 very distinctive objectives.

The first is to ensure that our advisers are able to do what they need to do for their clients and allowing them to get on with the job at hand.

Second is to provide a platform for our advisers to be compliant in running their business. Our compliance regime is based on the underlying law and the framework around it. We focus on the "key issues" to make sure we are delivery appropriate advice to our clients and protecting our advisers and their businesses by doing so within a structured framework based on common sense and logic.

Thirdly, we want to ensure that our advisers are running their businesses as efficiently as possible and have processes and technology that support this end. We have access to a team of people in their respective areas of expertise ensuring that we have a "best of breed" solution.

Lastly, we know it is important for the adviser to be the "trusted gatekeeper" to their client. We have therefore put together a suite of services that you can access for your clients. This means you can have appropriately qualified experts attending to your client's needs in concert with your advice and not be concerned about the client "walking through another door".

SHARTRU'S FEES

Shartru Wealth (SWM) has a flat fee arrangement for authorised representatives who utilise our AFSL services. By charging a flat fee, rather than a percentage of business revenue, ensures that as your business grows you are not paying more fees than you should be.

Depending on your business structure, SWM's AFSL fees for authorisation will be charged at $25,000 or $35,000 per annum (plus GST, paid monthly). Professional Indemnity Insurance is charged separately via a percentage of business income, between 1% - 2%. Your fees include, but are not limited to:

- ✓ License under AFSL
- ✓ XPlan Client Focus & hosting CRM
- ✓ Kaplan OnTrack subscription
- ✓ GSuite license
- ✓ Compliance support
- ✓ Access to Investment Committee & support
- ✓ IT Helpdesk
- ✓ Complex Advice team support
- ✓ Access to adviser network support
- ✓ Transitions assistance & support
- ✓ Access to specialized communication & internal training platform

14 Macquarie Street, Belmont NSW 2280 PH: 1300 478 424
E: advice@shartru.com.au