



SINCLAIR WILSON



Sinclair & Wilson Investment Services Pty. Ltd.

AFSL 229238

Costs and Services

Premier Service

High net worth = complete service & maintenance

It can be costly to service and maintain a large investment portfolio.

Sinclair & Wilson Investment Services Premier Service Package suits high net worth clients and encompasses all costs involved in financial planning. This includes review, full service, strategy development and implementation.

This is charged as a single fee, with flexible payment options with no other additional costs and offers exceptional value. It is based on a set fee per annum, determined as a percentage of your funds under our management.

Rest assured we will clearly outline these costs and provide you with a signed agreement before we undertake any regular service on your behalf.



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