



SINCLAIR WILSON



# Sinclair & Wilson Investment Services Pty. Ltd.

AFSL 229238

Costs and Services

**Review**

# Stay in step with the ever-changing world of investment

It is important to be always reviewing your investments, to make sure the changing nature of investment markets is always to your benefit and in line with your investment needs and goals.

We can regularly undertake a comprehensive review of your investment portfolios, providing full reporting and recommendations should changes to the underlying investments or strategy be required. This is based on a set fee per annum and calculated as a percentage of your funds under our management.

Strategy development and investment implementation is charged in addition to this fee.

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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