

DATA ENTRY, DATA COLLECTION & COMPARISON REPORTING



What will you provide to Clear Planning

- Scanned copy of Fact Find
- Copies of Statements (if available)
- Certified ID
- Signed Authority to Access Information Form

What Clear Planning will do

- Enter client data into FP Software (Xplan, Adviser Logic etc)
- Send off Authorities & ID to each Super Fund
- Follow up call to each Super fund to obtain details
- Complete Data Collection
- Complete Super Comparison Report based on preferred fund list
- Update FP software with existing details

Delivered within 5 business days

- Data Collection spreadsheet (with side-by-side summary page)
- Super Comparison Report
- Reverse Fact Find in Word or PDF format (if required)

\$150
incl GST