

Fees & Charges – Personal Assist

Personal Assist is a unique one-to-one service where we can do as much or as little as you want to help you manage your financial and property affairs. You remain independent and in control, and have your own personal adviser to provide advice and support when you need it.

We can help with things like...

- collecting mail and paying bills
- completing tax returns
- managing bank accounts and investments
- organising household and garden services
- arranging home repairs
- helping people stay independent
- choosing and moving to retirement homes
- buying, selling or managing property.

What will it cost?

Because Personal Assist is tailored to your needs, the set up and ongoing costs will depend on what you want us to do. There's no annual fee – we simply charge an hourly rate (with some minimum charges), a percentage for any income collected or a set fee for preparing a property enduring power of attorney and other tasks such as payment fees. Our hourly rates are based on how complex the work is and reflect the expertise needed to do the job. Whatever the rate, you only pay for the time it takes to do the work. So if it takes 15 minutes we only charge for 15 minutes.

Standard charges	Fee (including GST)
Hourly rate – level 1	\$210 an hour
Hourly rate – level 2	\$240 an hour
Hourly rate – level 3	\$275 an hour
Income handling fee (on gross income we collect) <i>(This fee may vary depending on your circumstances and the type of income being handled)</i>	5% plus GST if any (maximum)
Preparing a property enduring power of attorney	\$150 (set fee)
Payment fee – electronic	\$2.25 (set fee)
Payment fee – manual or cheque	\$11.25 (set fee)
To prepare and file your tax return	\$200 an hour (minimum fee)
There will also be office costs, such as photocopies, faxes and postage.	

Here are some examples...

The cost of setting up your Personal Assist service might range from \$210 an hour for organising house maintenance – to a few thousand dollars for arranging more complex services such as selling your home, finding a suitable retirement home, and managing your tenants and other investments.

Once everything is set up, it can cost as little as a few dollars per month to manage ongoing bills. We can also provide other services such as paying bills, collecting income, and organising repairs and service providers for you. This is charged at an hourly rate for the time it takes to do the work.

At your first meeting we'll talk through your situation and how we can help. There is no charge for this initial meeting. If you decide to go ahead, we will need to set out your wishes with a letter of instructions and prepare a property enduring power of attorney appointing us as your property attorney. Once everything is set up, it can cost as little as a few dollars per month to manage ongoing bills. We can also provide other services such as applying for subsidies, arranging insurances, and organising repairs and service providers for you. This is charged at an hourly rate for the time it takes to do the work.