W S

WEALTH SPA

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INVEST IN YOURSELF
fund your dreams

There are a variety of ways we can help you fund your dreams. Here is a list of services offered to assist you in reaching your financial goals.

services à la carte

INVESTMENT PORTFOLIO ONLY

This service includes investment policy statement, investment planning projections, investment review & proposals, investment tax planning and asset allocation review to grow your assets.

Available Across Canada

Service & Management Fee: < 2.5% of Investable Assets
Household Account Minimum: $150,000*
Yearly Reviews**

INSURANCE PORTFOLIO ONLY

This service includes risk management review, insurance planning, insurance tax planning, insurance recommendations, insurance summary.

Available in Alberta & BC

Commissions paid directly to advisor from insurance companies.
No additional fees.
Yearly Reviews**

FINANCIAL EDUCATION PLATFORM

This membership service includes 1-year online access to Wealth Spa Online so you can learn about all things money. Also, includes access to the private Wealth Spa™ Facebook Group, Free Workshops, Discounted Seminars, and a free copy of Strut: How to Kick Financial ASSets.

Available Across Canada

$297
Monthly Payment Plan: $29 x 12 payments
(gst not included)

FINANCIAL EDUCATION BOOK

Just getting started or want to learn more about money?
Strut: How to Kick Financial ASSets is a Canadian Financial Planning Book for Women. Also available on Amazon.ca.

$20.00 (includes gst)

ADDITIONAL SERVICES

$225 per hour

* If household assets are below this amount, the minimum service fee of $29/month or $297/year (wealth spa lite package) will come into effect. If household assets are over $500,000 wealth spa retirement package is included in the service fee.

** Yearly Reviews can be electronic, by phone, video conference, or in person. Additional reviews are to be initiated by the client and are the responsibility of the client when any material change has occurred and a planning review needs to be completed. Material changes can be, but are not limited to: a change in marital status, birth of a child, death of a family member, moving, job transition, additional sources of income, updating client contact information, etc. Anything that could impact your tax situation or financial plan.

LISA ELLE *founder*
BMGMT, CFP, FCSI, CPCA, EPC, CCS

We look forward to helping you to helping you create financial clarity and fund your dreams.

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WEALTH SPA

FINANCIAL PLANNING BASICS INCLUDES:

- ONE-PAGE FINANCIAL PLAN
- GOAL SETTING
- NET WORTH SUMMARY
- INSURANCE REVIEW & SUMMARY
- INVESTMENT REVIEWS
- SECOND LOOK TAX REVIEW
- DEBT PLAN
- CASH FLOW PLAN

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wealth spa packages

WEALTH SPA GET STARTED

This package includes:

- financial planning basics
- wealth spa online 1-year membership
- copy of Strut: How to Kick Financial ASSets

Household Account Minimum: $0

$997
Monthly Payment Plan: $99 x 12 payments
(gst not included)

WEATLH SPA RETIREMENT

This package includes:

- financial planning basics
- retirement cash flow projections
- insurance & investment portfolio services
- wealth spa online 1-year membership
- copy of Strut: How to Kick Financial ASSets

$1997
Monthly Payment Plan: $196 x 12 payments
(gst not included)

WEALTH SPA ESTATE

This package includes:

- financial planning basics
- tax assessment & estate plan
- legacy planning
- insurance & investment portfolio services
- wealth spa online 1-year membership
- copy of Strut: How to Kick Financial ASSets
- executor services available

$2997
Monthly Payment Plan: $257 x 12 payments
(gst not included)

WEALTH SPA LITE

This package includes:

- yearly base-plan for all household accounts <$150,000 in assets
- wealth spa online membership (ongoing)
- copy of Strut: How to Kick Financial ASSets

$297 / year
or
Monthly Payment Plan: $29 (ongoing)
(gst not included)

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