

ELLEMENTS FINANCIAL GROUP  
CLIENT SERVICES

service  
standard  
includes:

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- Initial Financial Consultation & Holistic Financial Review
  - Insurance or Investment Products Provided Based on Your Needs
  - Annual Review Appointment to Review Your Accounts and Situation
  - Monthly Email Newsletter with Industry, Product & Tax Updates
  - Ability to Get Your Financial or Account Questions Answered As Needed
  - Investment Portfolio Monitoring and Contact for Recommended Portfolio Changes
  - Insurance Renewals & Quotes Always Available Upon Request
  - Basic Financial Projections
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No additional fees.

Compensation provided by  
Insurance & Investment Companies.  
Additional Financial Planning Rates  
Charged at \$250 per hour for  
services required over and above.

WEALTH  
SPA™



ellementsgroup.com



THE WEALTH COLLECTIVE™

# WEALTH SPA™

## membership includes:

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- Personalized 1-on-1 Financial Plan with a Wealth Spa™ Advisor
  - Wealth Spa™ Online Membership Financial Library
  - Wealth Collective™ Community
  - 1-on-1 Answers to ALL Your Money Questions Coaching Calls As Needed
  - Copy of Strut Book
  - Deep Discounts on Financial Services such as Taxes & Estate Planning
  - Access to The Wealth Collective™ Referral Affiliate Program & Bonuses
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**\$97 USD / MONTH**

(Annual Value \$4,997)  
Non-Refundable  
No Contract  
Cancel at Anytime



[elementsgroup.com](http://elementsgroup.com)  
[wealth-collective.com](http://wealth-collective.com)



ELLEMENTS FINANCIAL GROUP  
RETIREMENT PLANNING  
PACKAGE

this package  
includes:

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- Retirement Planning Detailed Plan with Tax Considerations
  - Full Holistic Financial Review
  - Estate & Asset Transfer Plan and Review
  - One-Year Support or Adjustments to Plan
  - Copy of Strut
  - BONUS: One-Year Wealth Spa™ Online Financial Library Membership
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**\$1497\***  
PLUS GST

\*Payment Plan Available  
12 Monthly Payments of \$139.00

\*\*Fee Only Service

WEALTH  
SPA™



[ellementsgroup.com](http://ellementsgroup.com)



ELLEMENTS FINANCIAL GROUP  
TAX PLANNING SERVICES

services  
include:

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- Preparation of Taxes
  - Filing of Taxes
  - Personal or Corporate
  - Bookkeeping Services
  - Tax Planning Review
  - Go-forward Tax Strategy
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**\$75 hourly rate**

GST is not included in these prices  
and will be added.

Preferred Client Pricing is as follows:

Wealth Collective™ Rates:

\$45 hourly rate

Regular Client Rate:

\$60 hourly rate

Contact [admin@ellementsgroup.com](mailto:admin@ellementsgroup.com)  
for more information.

WEALTH  
SPA™



[ellementsgroup.com](http://ellementsgroup.com)



ELLEMENTS FINANCIAL GROUP  
ESTATE PLANNING SERVICES

services  
include:

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- Probate Review & Asset Transfer Plan
  - Last Will & Testament
  - Personal Health Directive
  - Enduring Power of Attorney
  - Wealth Spa™ Estate Planning Guides
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\$350 SINGLE  
\$500 COUPLE

GST is not included in these prices  
and will be added.

Preferred Client Pricing is as follows:

Wealth Collective™ Rates:

\$100 Single

\$200 Couple

Regular Client Rate:

\$195 Single

\$295 Couple

Contact [estate@ellementsgroup.com](mailto:estate@ellementsgroup.com)  
for more information.

WEALTH  
SPA™



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