



# INITIAL ENGAGEMENT PACKAGES

Financial Planning



[www.LeapfrogLIFE.com.au](http://www.LeapfrogLIFE.com.au)



# DOMINIQUE BERGEL-GRANT

Dominique Bergel-Grant is your Lifestyle Designer and Financial Expert. She is a leader in the financial planning industry and is regularly called on by media for her trusted expertise.

"I am a strong believer that sitting still is choosing to fail and that being successful in LIFE is about getting the balance right.

LIFE, after all, would be boring if all we ever did was make LIFE decisions based on financial outcomes alone.

It has been an amazing LIFE journey to this point, and a big thank you to my Mother who allowed me to experience LIFE to the fullest. At the age of seven, she put me on a plane from Sydney to the UK to boarding school thousands of miles away from everything I knew. Being thrown in the deep end and learning to paddle has made me who I am today. I am proud to have built a successful business by using the values I learned through becoming a seeker of adventure and not following the flock.

The best part of what I do is that it allows me to share my knowledge. This allows me to witness my clients build real wealth, and not just in financial terms.

I am always seeking moments that do not just make me happy, but also make me joyful. Whether it is sharing my knowledge with a client, spending time with family and friends, or skiing down the slopes.

"I have designed my LIFE and I want to share this knowledge with my clients."



## Awards and Achievements:



## A Trusted Expert For:



## Memberships and Community:



# LIFE'S PINCH POINTS

\$660 FOR 90 MINUTE SESSION



## FOCUS ON TODAY

This LIFE Pinch Point Session is to help you through a pinch point you are facing in your LIFE. Where you are looking for expert guidance, however, are not yet ready to engage a financial planner for long-term financial advice and support.

## WHAT IS INCLUDED?

You will have the opportunity for a 90-minute online session with award-winning Lifestyle Designer & Financial Planner Dominique Bergel-Grant. This is your chance to focus on what is blocking you from moving forward and receive one-off guidance.

### KEY INCLUSIONS

- One 90-minute general advice session
- Focus on your key pinch point
- The session is recorded and you are provided a copy so you can focus on the meeting and not on taking notes
- Secure online platform delivery

### EXAMPLES OF TOPICS TO SELECT FROM

While this is not an exhaustive list, some past topics with clients have been:

- How can I bulletproof my future
- I need a financial rescue package
- Understanding how to set the right goals
- Finance 101 and getting your money basics right
- Money and relationships
- General Q&A Session
- Couples the conversation you need to have
- Starting a Small Business
- What you need to know to financially succeed in your 20's / 30's / 40's / and 50's
- How Much is Enough Retirement
- Busting Myths of SMSF

### WANT TO UPGRADE

Want to add on product specific advice such as which superannuation fund is best for you, or what investment account to open, a fee of \$440 is applicable per account to be reviewed. Want to extend your session \$330 per half hour block is available.

# DRIVER'S SEAT

LEAPING TO FINANCIAL FREEDOM  
FROM \$3,275 FOR INDIVIDUALS  
FROM \$4,495 FOR COUPLES



## BUILDING THE ROAD AHEAD

Working with Dominique, you will build your personal goals roadmap with a clear focus on what your ideal lifestyle picture looks like. Dominique will then build a strategy to achieve this lifestyle, with a focus on the steps you need to take in the next 5 years. Whilst also considering the longer term picture.

## WHAT IS INCLUDED?

There are six steps involved in the building of your roadmap. Each step has been carefully crafted to ensure that you have the knowledge required to execute. It is important to note that the Driver's Seat Program should be followed by one of our ongoing support packages for maximum benefit.

### STEP 1 - KNOW YOUR CASHFLOW

After years of helping clients leap ahead financially, the one thing all clients need as a starting point is to have a clear understanding of their current spending habits. This is about more than putting together a budget, this is about identifying habits, benchmarking your spending and getting honest feedback.

- Access to exclusive money tracking software for 3 months or alternative software solution
- Creation of a new spending plan with Kylie Mar The Money Maker in a 60-minute session
- Identification of cash flow items that can create savings
- Understanding of any large one-off expenses expected in next 2 years
- Creation of your household Profit and Loss statement

### STEP 2 - LIFESTYLE PRIORITIES & FINANCIAL GOALS

Because we understand LIFE is about more than money, we invest time in understanding what is important to you. Dominique will work with you, using unique tools, to help create goals specific to you. Whether it is the education for children, taking the next step on the property ladder, being able to afford that dream family holiday, retiring in comfort or anything else you dream.

- 90-minute session with your Lifestyle and Financial Expert Dominique Bergel-Grant
- Identification of your financial and lifestyle goals
- Prioritisation of goals in line with values and outcomes

## STEP 3 - YOUR INVESTMENT PHILOSOPHY

Risk means different things to everyone. Dominique has developed a unique tool to help explore your past financial decisions and assess what level of financial risk is suitable for your future based on your own individual Investment Personality. Key important factual information on your assets and liabilities will also be collected at this time to help prepare for the next step.

- Access to an exclusive online risk assessment tool
- 30-minute session with Dominique Bergel-Grant
- Education around shares vs property investing
- Confirmation of your selected risk profile for both short and long-term investments
- Assessment of current investments vs risk profile

## STEP 4 - BALANCE SHEET & BULLETPROOFING

Dominique and the team will work with you to ensure we have all the information right for your financial facts and figures. During this time the team will also be working with your existing superannuation, investment and insurance providers to ensure we have all the details we need to give you the right advice. We will also use this time to explore what risks you currently face and how to protect them.

- 90-minute session with Dominique Bergel-Grant
- Creation of Balance Sheet and identification of gaps
- Discussion of risks you face and cost to protect these
- Review of your current estate planning, including Wills and Powers of Attorney

## STEP 5 -YOUR ROADMAP DELIVERED

Your financial and lifestyle roadmap is delivered to you clearly outlining the choices available to you and the recommended path to follow. This document will contain a range of different strategies to implement with a focus on the next five years. It will however also provide you a big picture view of your lifestyle in the long-term. The financial and lifestyle benefit will also be clear with each strategy step recommended.

- The session is recorded for your future reference
- 90-minute session with Dominique Bergel-Grant
- Access to further education as required online
- Timeline for strategy implementation
- Strategies to fill in any financial gaps as outlined in step 4
- All goals and priorities in step 2 will be addressed
- A clear cost-benefit analysis for any product recommendations

## STEP 6 - QUESTION & ANSWER SESSION

This is about ensuring you have the opportunity to further explore your financial options further, have any questions answered about the advice provided and put in place a plan to implement and make real change!

- 90-minute session with Dominique Bergel-Grant
- Time focused on educating you to ensure you understand your roadmap
- Put in place an agreed to implementation schedule
- Select ongoing support package

## ONGOING SUPPORT PACKAGES

To provide you support as you LIFE changes and as you implement your financial and lifestyle roadmap we have a range of support packages to give you ongoing access to Dominique and the team. [Click here to discover more.](#)

# TAILORED

YOU ARE NEEDING MORE FOCUS ON TODAY



## LIMITED ADVICE FOR TODAY

Not every client is ready for a full lifestyle and financial roadmap that our Driver's Seat Package delivers. Sometimes your needs are focused on today.

We will custom design you an engagement package to suit your needs.

## WHAT IS INCLUDED?

This will be tailored advice focused on typically a specific product such as superannuation or one-off strategy you need to have created and implemented.

### EXAMPLES OF TYPES OF LIMITED ADVICE AND COSTS

Superannuation consolidation and selection of investments (\$1,990 + \$330 for each additional account)

Home upgrade or property investment advice (\$2,400, if you are utilising our mortgage broking services this is discounted to \$1,200)

Insurance advice such as life or income protection cover (\$990, rebate if insurance implemented within 30 days)

Retirement planning including projections of how long funds will last (\$2,960 Individual, \$3,400 couple)

Creation an investment portfolio (\$1,990 + \$330 for each additional account)

Advice on contributions to superannuation (\$1,990 individual, \$2,420 couple)

### MEETING FORMAT

- First Meeting 45 minutes - Confirmation of objectives of limited advice and data collection
- Second Meeting 45 minutes - Presentation of limited financial advice
- 60 minutes of implementation support

## ONGOING SUPPORT PACKAGES

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# MY SUPPORT PACKAGE

## SELECT YOUR PACKAGE

### Individual

☐ PINCH POINT ☐ DRIVER'S SEAT

### Couple

☐ PINCH POINT ☐ DRIVER'S SEAT

### Other Tailored Solutions:

☐ TAILORED - OUTLINE AGREED ADVICE FOCUS AND COST:

## OPTIONAL EXTRAS

### Money Maker Program

☐ ONLINE ☐ WEALTH ☐ PLATINUM

### Mortgage Advice

☐ REFINANCE ☐ PURCHASE

### Small Business Advice

☐ ASPIRE ☐ FOCUS ☐ MASTERMIND

## YOUR CONFIRMATION

By signing this page you acknowledge confirmation of commencement of your selected Engagement Package. Please also confirm your email address for all correspondence below:

Name

\_\_\_\_\_

Signature

\_\_\_\_\_

Email

\_\_\_\_\_

Date

\_\_\_\_\_



# Dominique Bergel-Grant

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