Financial Health Planner

We all have goals. Whether they involve paying off the house, spending more time giving to the community or retiring early to make the most of family life. Whatever they are, financial and life planning are inseparably linked.

Financial Health Planner (FHP) is a unique digital tool that gives an individual or couple the ability to forecast what their financial future might look like.

How can it help?

Users are able to input financial information which is calculated to estimate their long term financial position to assist with planning for life and retirement.

FHP allows you to plan and achieve your financial goals and create different scenarios to reflect different life choices.

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SBA SMALL BUSINESS ACCOUNTING

Who is Financial Health Planner suited to?

- Business owners

- Property investors

- Business owners wanting to add value to their employees remuneration package

- Anyone who wants to plan for their retirement or understand the financial affects of different life choices

What do you get and how much does it cost?

- You will get access to the digital Financial Health Planner tool as well as a workshop with a PwC specialist, to guide you through how to use the tool and its benefits

- We will show you how to create different scenarios and reflect different life choices

- You will walk away with access to the tool and the knowledge on how to adjust it in future years

$2,500
Private Session
Cost per session

- Private one-on-one workshop with a PwC specialist for an individual or couple

- Access to the Financial Health Planner digital tool for 1 year

$1,500
Group Session
Cost per user*

- Part of a group workshop with up to four other individuals/ couples and a PwC specialist

- Access to the Financial Health Planner digital tool for 1 year

$250
Ongoing
Subscription fee
Per user* per annum

- After you have completed a Financial Health Planner workshop, you can continue to access the digital tool for a subscription fee

- The amount quoted is per individual/couple

* The price quoted per user, is for per individual or couple