

SCI Concierge Services Guide

CIP Licensing Limited
Australian Financial Services
Licence No. 471 728



THE INVESTMENT COLLECTIVE

**SCI CONCIERGE
SERVICE**

Welcome

Thank you for the opportunity to present our Spinal Cord Injury Concierge Service to you.

As a professional services firm, we understand the importance of high standards, technical skills and a tailored approach to optimise the financial position of our clients. The Investment Collective has always followed this philosophy for financial planning clients, but through the servicing of clients living with a disability (including Spinal Cord Injuries), we understand that some clients require extra planning to live comfortably in their day to day lives.

This is why we have broadened our capabilities to include the Spinal Cord Injury (SCI) Concierge Service. This service has been created to help those living with Spinal Cord Injuries to cultivate an in-depth personalised plan that prioritises client centred care.

We place great value on our solid reputation and are proud to be your planning partners. Our experienced SCI Concierge Manager will work to understand your care needs and create a service plan that works for you. We provide assistance in various areas including;

- NDIS
- Stock control
- Financial planning
- Bookkeeping
- Support coordination
- Administration
- Housing/accommodation

Everything you need to know about The Investment Collective's SCI Concierge Service can be found in this document and on our website www.investmentcollective.com.au/services/sci.

For more information about The Investment Collective, please follow the link below to view our Financial Services Guide on our website www.investmentcollective.com.au/services/financial-services-guide.

Who are we?

Welcome, it's great to meet you.

CIPL (Holding) Limited (trading as The Investment Collective) is an unlisted public company with around 60 shareholders. Many of these shareholders comprise management, staff and clients. The Investment Collective has offices in Rockhampton, Melbourne and Gladstone.

We are the first to admit the world of business can be daunting and often confusing. We know it's easy to get lost in what a financial services company has to offer, which is why we have kept our ethos simple. We place great value on our solid reputation and are proud to work with you.

The purpose of the SCI Services Guide is to provide you with an overview of our SCI Concierge Service, how we work and how you will be charged for our service.

We've come a long way

Initially established in 2001 as a wholly owned subsidiary of The Rock Building Society Limited, the business is now an independently owned public company.

The Investment Collective is very proud to service the local communities where our offices are located. We are also proud that our commitment reaches right throughout the country and even overseas.

We're not obliged to sell the products of any particular provider, which means we will only recommend products and services we believe are suitable for meeting client needs. That's what we do best.

Taking the first step



First meeting

Like any 'getting to know you' session, our first meeting is absolutely free.

It is an opportunity for us to walk you through our services and find out how we can best assist you. If during the meeting you would like to make a decision to join us, we can begin to gather information regarding your care services and needs. If you need some time to think about what we can do for you, take your time and come back to us when you are ready. Our door is always open.

Moving forward

As your SCI Concierge, we will need to get to know you well. In order to do that we will begin gathering information from you, and ask questions about your current and future care requirements.

Developing a strategy

Preparing for ongoing reporting and assistance involves us asking many questions. This will give us insight and help us to understand your circumstances.

From there, our SCI Concierge Manager will offer recommendations and advocate in your best interest to develop a plan. We will listen and consult you every step of the way. The journey is yours and so are the decisions.

We will outline our service offering, work to understand your requirements and advise on services that will provide the most benefit. From here, you will be presented with a strategy tailored to your needs.



How we will work together to implement your plan

Who you will be dealing with

Our SCI Concierge Manager will work with you during the implementation phase and will ensure that your current day to day care services are maintained and managed throughout any transition period. We will assist in coordinating any changes with minimal disruption.

Once your daily health and care routine is in place with the right team, we can confidently move on to fulfil other goals. Every disability and personal life path is different and will be reflected in your plan.

Recurring service

This is an exciting phase, by now you should be not just comfortable with your

plan but impressed by it. Moving past the initial implementation to streamline your care, you can look forward to receiving weekly updates letting you know that your care needs and servicing are complete and up to date.

Keeping you informed

It is only natural that you want to know more about the details. Feel free to ask us if you have any questions or queries about your care, reporting or our services. We are only an email or phone call away. Our SCI Concierge Manager can be contacted Monday through Friday from 8:30 am to 5:00 pm (AEST).

Each week you will also have an in person visit from our SCI Concierge Manager to ensure that your care needs are being

met and that any important information is relayed to you. Whether you are at home, in a care facility or in the hospital, we will take the time to ensure that you are kept informed.

How we get paid

We keep our fees simple and straightforward so you always know what you are paying for. We strive to keep things easy to understand. Many clients will be eligible to receive financial support directly from the NDIS. However, due to the holistic nature of our plans, fees are broken down by each individual service. Please enquire for further pricing information.

Did You Know?

In Australia, \$3.7 billion is spent annually on personal and health care, lost productivity and the reduced wellbeing of those living with Spinal Cord Injuries.

Reference: spinalcure.org.au



Our Services

Our list of services is as diverse as our experience. All of our services aim to provide a high level of client centred care. Our vast experience across these services means that you will always be in great hands.

NDIS

Are you eligible for the NDIS but unsure of how the planning process works or what needs to be included in your plan? Our experienced team can liaise with the NDIS on your behalf and create a plan that is compatible with your needs. Our team can coordinate funded supports for self managed participants, liaise with plan managers and local area coordinators and provide reporting for annual plan reviews.

Stock Control

Keeping track of and ordering stock, liaising with suppliers and researching new products can be stressful and time consuming, especially when you need to fit it around your personal care regimen. Let our SCI Concierge Manager take care of this on your behalf.

Financial Planning

Financial planning is simply a term for organising your affairs in such a way that you get the most from your resources. Whether it is rearranging debts, building a share portfolio, managing cashflow, minimising tax or dealing with superannuation, we will take the time to understand your affairs and develop a plan to achieve the best outcome.

Bookkeeping

With our advanced corporate and financial knowledge backed by a strong administrative support unit, we are pleased to offer all-inclusive bookkeeping plans. Our team can take care of staff payroll, payment of invoices and BAS. We can help you define and achieve your care requirements while managing any day to day business compliance tasks.

Support Coordination

Services are required for various support needs from daily personal care, specialised medical appointments and social/peer interactions, just to name a few. There are various ways of securing these support services through the use of professional providers, the recruitment of your own team or through a combination of both. We can help you understand your options and assist in developing a plan that aligns with your needs.



Administration

We have an experienced administrative team on hand to help with any planned or ad hoc administrative tasks that are bound to pop up throughout the year. Our team can assist with staff communication and the development of policies and procedures for your care team.

Housing

You may be renovating your current home to suit your disability needs, selling or looking to find a more suitable dwelling. There are also many options regarding accommodation, many of which require you to liaise with financial specialists, accommodation providers, the NDIS, lawyers, real estate agents, builders and more. Our SCI Concierge Manager can coordinate with external parties to ensure you have control of the outcome.

Our Team



Diane Booth - SCI Concierge Manager

Diane joined The Investment Collective in 2017 as an Executive Assistant to our Managing Director. Throughout her time with the business, she has worked in administration, HR and management roles which have provided her the necessary skills to lead our SCI Concierge Service. Along with her strong business acumen, Diane understands the disability support sector through her direct experience as a carer for a family member living with a disability. Diane aims to create a genuine and trusting relationship with her clients through the implementation of sound strategies, procedures and the streamlining of any business needs.



Tracey Briggs - Financial Adviser

Tracey hails from South Africa, where she worked at Investec Wealth and Investment for several years, building a wealth of experience as a Team Leader within client services. Tracey holds a Bachelor of Commerce and Diploma of Financial Planning. She joined The Investment Collective in 2016 and has worked in client services and paraplanning before moving to her role as a Financial Adviser. Tracey is passionate about helping her clients 'live their best life' through personal financial planning.



Allan McGregor - Financial Adviser

Allan has been a qualified Financial Adviser since 2018 and holds a Graduate Diploma in Financial Planning. He has lived in Gladstone for over 25 years, having previously held roles in local industry as a Chemical Engineer before becoming a Financial Adviser. Joining The Investment Collective in 2020, Allan seeks to help his clients achieve their goals through strong and lasting relationships, matched with sound financial advice.



Sue Hutchison - Bookkeeper

Sue joined The Investment Collective team in 2019 and has 20 years of experience working as a professional bookkeeper. Her experience has allowed her to manage her own business and work in roles across many industries including NDIS affiliated companies. Sue's breadth of knowledge has provided her with skills in various accounting software platforms and payroll processes. Current qualifications held include a Bachelor of Business (Accounting and Management) and a Cert IV in Bookkeeping.



THE INVESTMENT COLLECTIVE

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