

Tapping the professionals

FA portfolio investment services

FA FIRMS	TYPE OF SERVICE	PORTFOLIO FEE	ADVISER REMUNERATION	MIN INV AMOUNT
AIA FA	Advisory	Wrap fee of 1%; 0.7% for CPFIS	Commissions	\$1,200 - \$2,400 for insurance product; \$1,000 for third-party service
Endowus	Advisory	All-in access fee 0.25 - 0.6%	Fee only	\$100,000
FSM MAPS (iFast)	Discretionary	0.35 - 0.5% pa	Salary	\$1,000 lump sum; \$500 a month RSP
Great Eastern FA	Advisory	0.5 - 1.5%	Commissions	\$10,000 for a portfolio
IPP FA	Discretionary and advisory	Non-discretionary: Wrap fee 0-1%; sales charge 0-3%; Discretionary: Wrap fee 0.2-1%; platform fee 0.2-0.3%	Commissions	\$1 mil for discretionary portfolio; \$5,000 lump sum for advisory, RSP of \$100
Providend	Discretionary and advisory	One-time implementation fee of 1%; Annual wrap fee of 0.8%; platform fee 0.2%	Salary or share of portfolio fee	\$200,000
St James's Place Wealth Mgt	Advisory	All-in fee of 2.5% (1.5% SJP mgt fee; 1% underlying funds' annual mgt fee)	Fee based	Single premium \$70,000 or \$1,000 a month