Capitaliz PRICING GUIDE

STRATEGIC SOLUTIONS TO SCALE **YOUR SERVICES**

Capitaliz		Dashboard	
🙆 Home 🔑 Index	Company A Pty Ltd 0 Company Settings	A high-level summary of your progression through the Capitaliz Business Insights Report, preparation process, including a summary of basic completed product groups and autolending.	
		Company Overview	Value maximisation
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ENGAGEMENT TOOLS

for attracting + winning clients

- Unlimited access to the Value Gap Assessment • New marketing and prospecting tool for advisors
 - Capitaliz Academy Access + Customized Onboarding
- Collaboration forums, quarterly insights marketing support + more! •

STRATEGIC PLANNING

for managing plans + retaining clients

- Business Insights Report
- Dynamic Revaluation
- Project Management Platform
 - Implementation roadmaps, action item panel, checklists + more!

Our pricing plans reflect our confidence in your ability to grow your practice with Capitaliz.

STANDARD PLAN

- Unlimited access to Engagement tools
- Strategic Planning tools included for one client*
- Requires one year commitment

Two ways to pay:

\$5000/year

billed annually Cost savings of \$1,000 with one-time payment

S500/month billed monthly

*Fee of **\$350**/mo per client for each additional client profile



info@capitaliz.com www.capitaliz.com/get-started

SCALED PLANS

Cost per engagement is reduced as you reach milestones with your book of business.

\$1,500/month

Engagement Tools and Strategic Planning for 5

\$300 per month/ per client = **\$1,500** six month savings

\$275 per month/ six month savings

92% of Capitaliz advisors

add multiple, billable engagements in the first six months.

\$5,000 - \$8,000

are the average advisor fees collected per month.

