

Affinitas Financial Planning Financial Services Guide

ABN 60 096 670 754 | Authorised Representative No: 000283002

Version number: 24.04

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count) Financial Services Guide (FSG), 1 July 2024 and should be read in conjunction with Part One of our FSG dated 1 March 2024. Together these documents form the complete FSG.

Peters Professional Planning Pty Ltd trading as Affinitas Financial Planning is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG are authorised by Count to provide personal advice through Affinitas Financial Planning.

Our contact details:

Address: Suite 11/1000 Waterworks Road, The Gap QLD 4061

Phone: 1300 990 222

Email: service@affinitasfinancialplanning.com.au

Web: www.affinitasfinancialplanning.com.au

Bradley Peters



Authorised Representative Number: 001006518

Bradley Peters is an Authorised Representative of Count and a director of Peters Professional Planning t/as Affinitas Financial Planning, and receives a salary, plus dividends payable if company profits permit.

Brad has 38 years of experience in the provision of financial / accounting advice and 20 years' experience in the provision of financial planning advice. Brad attained a Bachelor of Arts Degree from University of Qld on 20 December 1988 and a Masters of Business Administration from University of Queensland on 19 December 1994. He is a registered tax agent, Fellow of CPA Australia and holds a Financial Planning Specialist designation from CPA Australia (awarded 21 December 2000).

Brad is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Margin lending, and
- Superannuation.

How to contact me: brad@affinitasfinancialplanning.com.au or 0409 031 765.

Thirza Stacey



Authorised Representative Number: 001004236

Thirza is an Authorised Representative of Count and an employee of Affinitas Financial Planning and receives a salary, plus dividends payable if company profits permit.

Thirza has more than 20 years of experience in the provision of financial planning advice. She holds an Advanced Diploma in Financial Planning, as well as Self-Managed Superannuation Funds and Margin Lending accreditations issued by Kaplan Professional. She is a member of the Financial Advice Association of Australia (FAAA).

Thirza is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks, and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Margin lending, and
- Superannuation.

How to contact me: thirza@affinitasfinancialplanning.com.au or 0435 867 663.

Advice preparation and implementation fees

Prior to the provision of personal advice, we will agree upon a preferred payment option and disclose how our fee is calculated. Below is a summary of our available payment options that can be combined to pay for our services. We will provide you with a quote for our services before we undertake any work on your behalf.

These fee options include:

Service based charging

- The fee for the preparation and implementation of our advice is calculated based upon a fixed price agreement. This fixed dollar amount will vary based upon the complexity of advice being provided and agreed upon prior to commencement. Our minimum fee for this is \$4,400 (incl. GST) up to a maximum of \$20,000 (incl. GST).
- Where it is determined that your service is for Insurance only advice, the fee for the preparation and implementation of our advice is \$1,100 (incl. GST) for a single person, \$1,650 (incl. GST) for a couple and \$2,200 (incl. GST) if your case is deemed complex.

If you decide not to implement our recommendations, the fee for the preparation of the Statement of Advice will be payable in full.

Supplementary service fees

For supplementary services, such as the provision of general research material or the completion of administrative tasks, our fee will be calculated on a time basis of \$330 per hour.

For assistance with Insurance Claims processing, which includes assistance with the preparation of paperwork and ongoing guidance, we will assist our clients with the first 10 hours free of charge. After this time, our fee will be calculated on a time basis of up to \$330 per hour, or via a negotiated lump sum fee.

Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.

Ongoing service fees

Our ongoing advice fees vary depending on scope and complexity and range from 0.66% p.a. to 1.00% p.a. (incl. GST) of funds under management unless otherwise agreed. The exact cost of the ongoing review service will be disclosed within the Ongoing or Fixed Term Service Agreement we provide to you.

We do not charge ongoing service fees to an Insurance only advice client.

Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$330 per hour, may be applied.

Non-advised transaction fees

If we assist you on an execution only basis (i.e. where you have been offered and declined advice), a fee of up to \$330 per hour will be applicable.

Referral arrangements

If you have been referred to us by McDonnell Hume Partners (MHP), and you use our services, MHP will receive up to 20% of the upfront revenue for the referral of your business. This will be paid from the total ongoing fees disclosed above and will not be an additional cost to you.

| Referral partner | Description of referrer | Payment structure |
|---------------------|----------------------------|--|
| <i>MHP Partners</i> | <i>Accounting Services</i> | Up to 20% of Upfront Adviser Service Fees e.g. for Advice and implementation fees of \$4,000, MHP would receive \$800. |

I may refer you to a third party for advice or services. Should this occur, you are not obliged to consult the professional person I have suggested. If you wish to consult a non-referral partner, I can provide additional options.

Other associations and relationships

Thirza Stacey is a director of TRACC Investments Pty Ltd which is the trustee for TRACC Family Trust; which are shareholders of Peters Professional Planning Pty Ltd which are separate entities.

Other third-party payments we may receive

We may also receive the following fees, which are not payable by you.

Stamping Fees

Where we facilitate Share Placements and Initial Public Offers in relation to ASX-listed Direct Equities (i.e. Shares - this excludes Listed Investment Companies and Trusts), we may receive up to 1.5% of the transaction value as "stamping fees".

Insurance Commissions

Where we facilitate the acquisition, or modification of a Life Insurance product, we may receive commissions as described in Part 1 of this FSG.

Where we provide advice in relation to the above transactions and charge an advice fee, we may choose to rebate part or all of the third-party payment, to you.
