

ABOUT YOUR ADVISER

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Authorisations

I am an authorised representative of Matrix Planning Solutions Ltd. I am authorised in the following financial services and products:

- Superannuation
- Pensions & Annuities
- Retirement Savings Accounts
- Cash & Term Deposits
- Managed Investments
- Investment Bonds
- Exchange Traded Products
- Government Debentures
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Aged Care
- Centrelink / Veterans' Affairs Assistance
- Business Insurance
- Insurance Claims Assistance
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary plus profit share

The following tables summarise the types of fees or commissions and indicative amounts that are applicable to the services that we provide. Before providing you with advice or services, I will agree with you the fees that apply. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up To
Implementation Fee	\$3,300
Hourly Rate	\$440

Remuneration	Initial	Per Annum
Adviser Service Fee	\$440 to \$9,900	
Insurance Commission*	0% to 66%^	0% to 35%

* Based on a % of funds invested or insurance premiums
^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

Benefits, Interests and Associations

The business and I do not have any related parties, shareholdings or referral arrangements that may influence my advice.