LifeNet(WA) Financial Advice Pty Ltd
Financial Services Guide

ABN 34 104 075 176
Authorised Representative No: 268227 **Version number: 23.01**

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count Financial) Financial Services Guide (FSG) dated 13 November 2023 and should be read in conjunction with Part One of our FSG dated 29 May 2023. Together these documents form the complete FSG.

LifeNet(WA) Financial Advice Pty Ltd is an Authorised Representative of Count Financial Limited (Count Financial).

The individuals listed in this FSG are authorised by Count Financial to provide personal advice through LifeNet(WA) Financial Advice Pty Ltd..

Our contact details:

Address: Suite 6, 232 Balcatta Road, Balcatta WA 6021
Phone: 08 9472 5611
Email: admin@lifenetwa.com.au Web: www.lifenetwa.com.au

Bendan Lynch

Authorised Representative Number: 297312

Brendan is an Authorised Representative of Count Financial and a director, shareholder and employee of LifeNet(WA) Financial Advice Pty Ltd, and receives a salary plus share of profits from the commissions and fees received.

Brendan has 31 years of experience in the provision of financial / accounting advice and 25 years' experience in the provision of financial planning advice. Brendan attained Advanced Diploma of Financial Services from Tribeca on 17/01/2005 and the Graduate Diploma of Financial Planning from Kaplan on 12/11/2021.He is Aged Care accredited, having attained certification with Aged Care Steps Pty Ltd, SMSF accredited with Tribeca and Margin Lending and Geared Investment with Kaplan Professional. He is a Fellow Chartered Financial Practitioner and a member of the Financial Advice Association of Australia.

Brendan 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,
- Investment advice,
- Retirement planning advice and
- Superannuation, including Self-Managed Superannuation funds.

How to contact me: brendan@lifenetwa.com.au or 0411 533 827.

Timothy Blottin

Authorised Representative Number: 417365

Tim is an Authorised Representative of Count Financial and an employee of LifeNet(WA) Financial Advice Pty Ltd, and receives a salary and a potential bonus payable if he meets a range of performance criteria.

Tim has 15 years of experience in the provision of financial / accounting advice and 11 years' experience in the provision of financial planning advice. Tim attained the Diploma of Financial Planning from Monarch Institute on 23 November 2016.

Tim 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
- Investments,
- Retirement planning advice,
- Superannuation.

How to contact me: tim@lifenetwa.com.au or 0438 670 732

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.

Current fees and charges (GST inclusive) are:

Advice Preparation Fees

Fees for the preparation of your advice may range from $1,100 to $9,900.

Advice Implementation Fees

Fees for the implementation of your advice may be a set fee between $1,100 and $5,500.

Alternatively, our implementation fee can be calculated as a percentage of your total portfolio ranging between 0.1% and 5.5%.

The exact amounts of fees and charges and initial and ongoing commissions for the products you have purchased as a result of my recommendation to you will be detailed in your Statement of Advice.

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 $350 per hour inclusive of GST.

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

Fixed Term Agreements

Our fixed term arrangement fees vary depending on scope and complexity and range from $2,200 to $11,000 (incl. GST) unless otherwise agreed. The exact cost of the fixed term arrangement service will depend on the review offering we recommend, and this will be disclosed within the Fixed Term Arrangement we provide to you.

We have tailored review packages that are available upon request.

Non-advised transaction fees

If we assist you on an execution only basis (ie where you have been offered and declined advice), a fee of up to $1,100 **OR** $350 per hour inclusive of GST will be applicable.

Other third-party payments we may receive

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

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.