

Financial Services Guide

PART 2 OF 2



Financial Planning

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ADVISOR DETAIL

Ken Filbey is the person who is providing the financial services to you. His ASIC Authorised Representative Number is 250452. Ken is a Director of Ken Filbey Financial Services Pty Ltd (ABN 39 083 310 865; ASIC Authorised Representative Number 257466).

Ken Filbey is an Authorised Representative and Ken Filbey Financial Services Pty Ltd is a Corporate Authorised Representative of Elders Financial Planning Pty Ltd, Australian Financial Services License Number 224645.

Ken has been involved in the financial services industry since 1991 and has been an Authorised Representative of Elders Financial Planning since 2011. Ken is a member of the Association of Financial Advisers (AFA).

SERVICES

Ken is authorised to provide advice on the following strategies and products

- ♦ Savings and wealth creation strategies
- ♦ Investment Planning
- ♦ Superannuation Planning
- ♦ Retirement Planning
- ♦ Risk and insurance analysis
- ♦ Personal and group Insurance
- ♦ Cash Management Trusts
- ♦ Retirement Income Streams
- ♦ Managed Investments
- ♦ Master Trust products
- ♦ Superannuation products

REMUNERATION

Ken Filbey and Ken Filbey Financial Services Pty Ltd receives a portion of the fee for service paid by clients and/or the brokerage/commission paid by product issuers to Elders Financial Planning Pty Ltd. The specific amount will be disclosed in further detail in the Statement of Advice document.

Fees that may be applicable for preparing your advice include:

- Advice Preparation – range from \$0 to \$4,500 depending on time and complexity of the advice document, calculated on an hourly rate of \$220. An estimated cost will be provided prior to the commencement of any work.
- Ongoing Fees – these will vary depending on the amount invested and the ongoing service arrangement you negotiate. These will be disclosed in full in the advice document.

Initial and Ongoing commission is also payable by some product providers, depending upon the investment or insurance premium amount.

All fees will be fully disclosed in a formal advice document.

NB: Costs include GST.

Ken Filbey Authorised Representative

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