

Financial Services Guide

PART 2 OF 2



Financial Planning

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ADVISOR DETAIL

Peter Baxter is the person who is providing the financial services to you. His ASIC Authorised Representative Number is 404764. Peter is a Director of Peter Baxter Financial Planning Pty Ltd, (ABN 97 149 913 888; ASIC Authorised Representative Number 404763).

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

Peter has been involved in the Financial Services industry for over thirty years, having previously worked at one of Australia's major banks.

Peter has been undertaking continual studies and workshops to enhance his expertise as a financial planner. Having obtained a Diploma in Business and Diploma in Financial Planning, Peter has also obtained the highest qualification of the financial services industry - Certified Financial Planner. Peter is a member of the Financial Planning Association.

As an Authorised Representative, Peter believes in helping his clients build a comprehensive program to make the most of their earning potential during their working years, as well as helping them with their retirement planning, superannuation, managed investments and estate planning needs. He achieves this by striving to provide quality advice, personalised service and practical ideas to deliver superior solutions.

SERVICES

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

- ♦ Savings and wealth creation strategies
- ♦ Investment Planning
- ♦ Superannuation Planning, including SMSF
- ♦ Retirement Planning
- ♦ Risk and insurance analysis
- ♦ Centrelink assistance
- ♦ Direct Equities
- ♦ Cash Management Trusts
- ♦ Retirement Income Streams
- ♦ Managed Investments
- ♦ Master Trust products
- ♦ Superannuation products
- ♦ Personal and group Insurance

REMUNERATION

Peter Baxter Financial Planning Pty Ltd and Peter Baxter 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.

Fees that may be applicable for preparing your advice include:

- Statement of Advice Preparation: range from \$0 to \$2,500 depending on time and complexity of the advice document, calculated on an hourly rate of \$250. Initial Commissions may be taken in payment of Statement of Advice fees. An estimated cost will be provided prior to the commencement of any work.
- Ongoing Fees: these will vary depending on the ongoing service arrangement you negotiate.

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.

Peter Baxter
Authorised Representative

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