

Financial Services Guide

PART 2 OF 2



Financial Planning

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ADVISOR DETAIL

R&S Morris Pty Ltd as trustee for the Morris Family Trust and Troy Bartlett Pty Ltd as trustee for the Bartlett Family Trust, trading as Premier Financial Planning and Investment Services, (ABN 28 503 300 994; ASIC Authorised Representative Number 440462) is the entity that is providing the financial service to you.

Troy Bartlett (ASIC Authorised Representative Number 461927) is an Authorised Representative and R&S Morris Pty Ltd as trustee for the Morris Family Trust and Troy Bartlett Pty Ltd as trustee for the Bartlett Family Trust, trading as Premier Financial Planning and Investment Services is a Corporate Authorised Representative of Elders Financial Planning Pty Ltd, Australian Financial Services License Number 224645.

Troy Bartlett is a Director of Premier Financial Planning and Investment Services.

As an Authorised Representative, Troy 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, risk insurance and estate planning needs. He achieves this by striving to provide quality advice, personalised service and practical ideas to deliver superior solution.

SERVICES

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

- ♦ Superannuation Planning
- ♦ Risk and insurance analysis
- ♦ Investment Planning
- ♦ Retirement Planning
- ♦ Superannuation products
- ♦ Personal and group Insurance
- ♦ Managed Investments
- ♦ Estate Planning

REMUNERATION

Premier Financial Planning and Investment Services and Troy Bartlett, as a Director, receive 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 \$4,500 depending on time and complexity of the advice document, calculated on an hourly rate of \$450. 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.
- Implementation Fee: up to 1.1% of the investment amount may be charged to cover the work involved with implementing the recommended strategy.
- Ongoing Service 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.

Troy Bartlett

Authorised Representative

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