# ABOUT YOUR ADVISER

## Stephen Jaensch | AR No.245996

### Profit and Retirement Planning Pty Ltd | CAR No.432447


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|---|---|
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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
- Self Managed Superannuation Funds
- Retirement Savings Accounts
- Cash & Term Deposits
- Managed Investments
- Investment Bonds
- Exchange Traded Products
- Government Debentures
- Listed Securities (shares & other products)
- Margin Lending
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Gearing
- 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 |
|---|---|
| SoA Preparation Fee | $9,900 |
| Hourly Rate | $550 |

| Remuneration | Initial | Per Annum |
|---|---|---|
| Adviser Service Fee | $0 to $5,500 | $0 to $40,000 |
| 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, associated entities or I have arrangements with the following parties.

| | |
|---|---|
| Related Parties | PRP Accounting Services |

Where arrangements include payments or benefits these will be disclosed to you in writing at the time of providing advice.