

# Sunshine Coast SMSF Solutions Pty Limited

## Financial Services Guide

ABN 476 115 139 58 | Authorised Representative No: 1242699

Version number: 14.01

### PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited Financial Services Guide (FSG) and should be read in conjunction with Part One. Together these documents form the Count Financial Limited FSG.

Sunshine Coast SMSF Solutions Pty Limited provides financial planning services to individuals and businesses.

The following individuals are authorised by Count to provide personal advice through Sunshine Coast SMSF Solutions Pty Limited.

Sharee Webster and Joanna Corney.

Our contact details:

Address: Suite 8 61-63 Primary School Court MAROOCHYDORE QLD 4558

Phone: 07 5451 6888

Email: [Info@SunshineSMSF.com.au](mailto:Info@SunshineSMSF.com.au)

Web: [Sunshinesmsf.com.au](http://Sunshinesmsf.com.au)

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#### Joanna Corney

**Authorised Representative Number:** 1245150

Joanna is an Authorised Representative of Count and an employee of Sunshine Coast SMSF Solutions Pty Limited; and receives a salary.

Joanna has 6 years of experience in the provision of financial / accounting advice and 6 years' experience in the provision of SMSF advice. Joanna attained a Bachelor of Commerce (Accounting and Financial Planning) from the University of the Sunshine Coast in 2013. Joanna is also an Affiliate Member of the SMSF Association.

#### Financial services and product types

Joanna is authorised to provide advice in the following areas:

- Basic deposit products
- Life insurance, and
- Superannuation.

**How to contact me:** [jcorney@sunshinesmsf.com.au](mailto:jcorney@sunshinesmsf.com.au) or 07 5451 6808

**Sharee Webster****Authorised Representative Number:** 1246186

Sharee is an Authorised Representative of Count and an employee of Sunshine Coast SMSF Solutions Pty Limited; and receives a salary.

Sharee has 28 years of experience in the provision of financial / accounting advice and 20 years' experience in the provision of SMSF advice. Sharee attained a Bachelor of Commerce from the University of Queensland in 1987 and a Diploma of Financial Planning from International Institute of Technology in 2016. Sharee is also a Chartered Accountant appointed in 1992, as well as a Chartered Tax Adviser from the Taxation Institute of Australia appointed in 2012 and a Registered Tax Agent.

**Financial services and product types**

Sharee is authorised to provide advice in the following areas:

- Basic deposit products
- Life insurance, and
- Superannuation.

**How to contact me: [swebster@sunshinesmsf.com.au](mailto:swebster@sunshinesmsf.com.au) or 07 5451 6802**

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## Advice preparation and implementation fee

Prior to the provision of personal advice we will agree upon a preferred payment option for both parties. Below is a summary of our available payment options that can be combined to pay for our services.

These payment options include:

### Time based charging

- i) The fee for the preparation and implementation of our advice is calculated based upon the time we spend developing the plan. Our hourly rate is \$385 per hour (incl. GST) with our advice preparation fee ranging from \$2,000 to a maximum of \$20,000 (incl. GST). Price can vary depending on scope and complexity and we will provide you with an estimate of the overall cost. If extra charges apply, then we will inform you before proceeding with any work.

### Service based charging

- ii) The fee for the preparation and implementation of our advice is calculated based upon a fixed price agreement. This fixed dollar amount will vary based upon the complexity of advice being provided and agreed upon prior to commencement. Our minimum fee for this is \$2,000 (incl. GST) up to a maximum of \$20,000 (incl. GST).

If you decide not to implement our recommendations, the fee for the preparation of the Statement of Advice will be payable in full.

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## 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 \$385 per hour.

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## Review service fees

Prior to the provision of any review service we will agree upon a preferred payment option for both parties. The options available are the same as those listed under 'Advice preparation and implementation fee' (see above).

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## Non-advisory implementation fees

**Execution only:** If we assist you to establish a Self-Managed Superannuation fund on an execution only basis (i.e. where you have been offered and declined advice), a fee of up to \$600.00 (incl. GST) may be applied.

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## Referral arrangements

We have a referral arrangement in place with the providers detailed below. If you use the services of these providers we will receive the corresponding fee disclosed in the below table for the referral of your business. This will be paid for by the relevant provider and is not an additional cost to you.

Referral arrangement	Description of referrer	Payment made to adviser
<b>Finconnect</b>	Finconnect provides lending and financing solutions to clients. These services will either be provided by a Finconnect lending manager or a loan writer at another Count Firm.	Any upfront commission received will be split 45-60% to the lending manager, 30% to Sunshine Coast SMSF Solutions Pty Limited and the balance to Finconnect. Any ongoing commission received will be split 30% to the lending manager, 30% to Finconnect and 40% to Sunshine Coast SMSF Solutions Pty Limited.
<b>Pacific East Coast Property</b>	Pacific East Coast Property is one of Australia's leading sources of property investments. They can assist clients that may be interested in investing in direct property.	A referral fee of 2% (plus GST) of the purchase price is paid to Sunshine Coast SMSF Solutions Pty Limited. This is paid in two instalments 50% on exchange of Contract and the remainder at settlement. In addition 1% of the purchase price is paid to Count Financial Limited, and will contribute to our firm's annual revenue contribution to Count. These fees are paid by Pacific East Coast and are not an additional cost to you.

<b>TFS</b>	TFS (AFSL No 224954) provides wealth protection solutions to clients. It is a wholly owned subsidiary of Countplus Limited, a publicly listed company on the ASX. Count Financial Limited currently holds a 36% stake in Countplus Limited.	Any commission received will be split 62.5% to TFS, 25% to Sunshine Coast SMSF Solutions Pty Limited and 12.5% to Count Financial Limited.
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**Other associations and relationships**

Sharee Webster and Anthony Lyndon Rossiter are directors and shareholders of both Sunshine Coast SMSF Solutions Pty Limited, Holmans Unit Trust and Holmans Marochydore Pty Ltd which are separate entities. Referrals may pass between these entities. Whilst there is no direct payment received by any party, there may be a potential financial benefit received by the owners of either business as a result of fees charged for services provided to the referred party.