

Financial Services Guide (Part Two)

1 January 2019



Rodney Johnstone

Authorised Representative No. 243345

I am an authorised representative of Total Financial Solutions Australia Limited (TFSA), AFS License No 224954.

I am employed by B & W Additions Pty Ltd, which is a corporate authorised representative of TFSA, Representative No 267299.

The services I can provide

- Wealth Creation
- Financial Planning
- Investment Planning
- Retirement Planning
- Superannuation And Rollovers
- Life Insurance
- Estate Planning
- Portfolio and Insurance Reviews
- Aged Care Advice

My education qualifications and experience

- Bachelor of Business (Applied Economics) Warrnambool Institute of Advanced Education
- Diploma of Financial Planning FPA
- Graduate Diploma in Applied Finance & Investments Securities Institute of Australia
- Essential Steps for Aged Care (Aged Care Steps (2018)

The products I can advise you on

- Deposit Products
- Risk Insurance
- Managed Investments
- Securities
- Superannuation
- Margin Lending
- SMSF

How to find me

My office is located at:
Level 11, 50 Market Street
Melbourne VIC 3000

If you would like an appointment to discuss your financial needs and objectives in more detail, please contact me by:

Phone: (03) 9629 1433
Fax: (03) 9629 2314
Email: rjohnstone@bwadditions.com.au
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Remuneration

Partnership that counts

Insurance Remuneration

For an insurance product written between 1 January 2019 and 31 December 2019 we may receive initial remuneration between 0 - 77% (including GST) and ongoing remuneration of up to 33% p.a. (including GST) of the annual premium.

Example: If your Adviser recommends an insurance product with an annual premium of \$400 per annum, TFSA may receive an initial payment of up to \$308 (including GST), of which 100% will be passed on to your Adviser. Also, TFSA will receive ongoing payments of up to \$132 per annum (including GST), of which 100% will be passed on to your Adviser.

Ongoing Fees

A fee may be charged for the provision of our ongoing advice service. This includes such things as the implementation of our recommendations, reviewing of strategies and investments and any changes required throughout the year. The fee will be quoted to you at the presentation meeting of your initial advice and become payable regularly or at your following annual review meeting.

For standard ongoing advice, including managed investments, superannuation or IDPS products, we may charge in any of the following ways:

1. A percentage of between 0% - 3% (GST inclusive) per annum charged through your platform or product, for example: if your Adviser recommends a superannuation product with a balance of \$100,000 and you are charged 0.5% (GST inclusive) your ongoing fee will be \$500 per annum; or
2. We may charge an agreed flat fee of generally between \$2,200 and \$22,000 (Inc GST) per annum which may be charged through your platform or product or invoiced directly to you.

Referrals

Partnership that counts

If you were referred to me, I may pay the person who referred you between \$0 and \$550 (incl. GST). I may also pay the person who referred you a one off and/or annual payment calculated as a percentage of the initial and ongoing remuneration paid by the product issuer.

If you were referred to me by any third party the specific referral arrangements applicable to your referral will be set out clearly in the Statement of Advice.

Relationships and Associations

Rodney Johnstone may own and may be entitled to acquire further shares in TFSA's parent company, CountPlus Limited (CUP).