

# Financial Services Guide (Part Two)

27 March 2019



## Thomas Weir

Authorised Representative No. 267298

I am an authorised representative of Total Financial Solutions Australia Limited (TFSA), AFS Licensee 224954.

### The services I can provide

- Wealth Creation
- Financial Planning
- Investment Planning
- Retirement Planning
- Superannuation and Rollovers
- Life and Disability Insurance
- Estate Planning
- Margin Lending and Gearing
- Portfolio and Insurance Reviews

### My education, qualifications and experience

- Bachelor of Commerce (University of Melbourne, 1984)
- Masters in Taxation (University of Melbourne, 1996)
- Chartered Accountant
- Financial Planning Proper Authority Course (Institute of Chartered Accountants in Australia, 2000)
- RG146 Compliance Program (Financial Planning Association, 2003)
- SMSF Adviser Course (The Strategist Group, 2003)
- SMSF Specialist Advisor (SPAA, 2005)
- Member, Association of Financial Advisers (AFA)

### The products I can advise you on

- Life Insurance
- Superannuation
- Self-Managed Superannuation Funds
- Managed Investments (including Investor Directed Portfolio Services)
- Securities
- Margin Lending
- Deposit Products
- Retirement Savings Accounts
- Government Bonds

### 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:

Phone: 03 9629 1433  
Fax: 03 9629 2314  
Email: [tweir@bourneandweir.com.au](mailto:tweir@bourneandweir.com.au)  
Mail: PO Box 200, Collins Street West  
Melbourne VIC 8007

#### Total Financial Solutions Australia Limited

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Office Level 11, 309 George Street, Sydney NSW 2000

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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 a 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

Thomas Weir may own and may be entitled to acquire further shares in TFSA's ultimate parent company, Countplus Limited.