

# ABOUT YOUR ADVISER

Andrew Shakespeare | AR No.323781

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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
- Deposit and Payment Products
- Managed Investments
- Exchange Traded Products
- Investment Bonds
- Government Debentures
- Listed Securites (shares & other products)
- Margin Lending
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Centrelink / Veterans' Affairs Assistance
- Budgeting and Cashflow Management
- Debt Management

## Remuneration

I am remunerated by:

- Salary

The following tables summarise the types of fees or commissions that are applicable to the services I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up To
SoA Preparation Fee	\$5,500
Implementation Fee	\$5,500
Hourly Rate	\$385

Remuneration	Initial	Per Annum
Adviser Service Fee	\$0 to \$5,500	\$0 to \$16,500
Adviser Service Fee (asset based)*	0% to 1.1%	0% to 1.1%
Insurance Commission*	0% to 66%^	0% to 33%

\* 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.

For example, a 1% Adviser Service Fee based on a \$200,000 investment would equal a \$2,000 fee payable.

## Benefits, Interests and Associations

The Business, associated entities or I have arrangements with the following parties.

Related Parties	JSA Accounting & Tax JSA Mortgages & Finance JSA Salary Packaging JSA Financial Services
Referral Parties	JSA VBD JSA H&M JSA McEwans JSA Financial Services
Shareholdings	ClearView Financial Advice

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