

Financial Services Guide (Part Two)

13 July 2018



**TOTAL
FINANCIAL
SOLUTIONS**
Partnership that counts

Travis Read

Authorised Representative No. 000454007

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

GPL Financial Group Pty Ltd is a corporate authorised representative of TFS, Representative No. 000263582.

The services I can provide

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

My education qualifications and experience

- Diploma of Financial Planning
Kaplan Professional (2018)
(revalidation of Deakin University DFP 1998)
- Bachelor of Commerce
University of Tasmania (1994)

The products I can advise you on

- Deposit and Payment Products
- Government Debentures, Stocks or Bonds
- Life Products
- Managed Investment Schemes
- Retirement Savings Account Products
- Securities
- Superannuation

How to find me

My office is located at:

732 Forest Road, Peakhurst NSW 2210

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

Phone (02) 9579 4655

Fax (02) 9570 3427

Email tread@gplfg.com.au

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Remuneration

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Initial Remuneration

A Statement of Advice preparation fee is payable. The fee is based on an hourly rate and will be agreed with you prior to commencement of work. You will be invoiced on completion. An additional implementation fee will sometimes be payable in complex situations where agreed.

Insurance Remuneration

For an insurance product written between 1 January 2018 and 31 December 2018 we may receive initial remuneration between 0-88% (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 \$352 (including GST), of which 100% will be passed on to your Adviser. Also, TFSA will receive ongoing payments of up to \$88 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 either monthly or following annual review meeting.

For standard ongoing advice we will charge between 0% - 1.1% (GST inclusive) or on an agreed flat fee level. Our fees vary depending on the complexity of the advice we provide.

Relationships and Associations

Partnership that counts

GPL Financial Group Pty Ltd may own and may be entitled to acquire further shares in TFSA's parent company, CountPlus Limited (CUP).