

About this document

This is Part 2 of the GPL Read Financial Services Guide (FSG) dated 20th June 2023 is to be read in conjunction with Part 1 of our FSG dated 21st October 2022. These documents together form the complete FSG. Travis Read is an Authorised Representative of GPL Read.

Contact Details

Our contact details are as follows:

GPL Read
732 Forest Road
Peakhurst NSW 2001
Phone: (02) 9579 4655 or
Mobile: 0418 551 143
Email: swong@gplfg.com.au

Steve Wong - Authorised Representative Number 001002689

Steve is an Authorised Representative of GPL Read. He is a salaried Adviser and may be entitled to a bonus for additional work.

Steve has over 17 years' experience in the financial planning industry, of which he has spent 7 years as a financial planner. Steve attained a Bachelor of Commerce from Western Sydney University in 2006 and The Diploma of Financial Services (Financial Planning) from Threesixty in 2010. He is also a member of the Financial Planning Association.

Steve is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life Products
 - Investment Life Insurance Products
 - Life Risk Insurance Products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Superannuation
- Qualified tax relevant provider

How to contact me: swong@gplfg.com.au, (02) 9579 4655 or 0434 450 588.

Advice Preparation and Implementation Fee

Prior to the provision of personal advice, we will agree on the preferred fee payment option for services. Where we are aware that you are investing with borrowed funds, we will charge a flat dollar fee.

Fee options include:

1. Time based charging – the fee for our advice is calculated on the time we spend developing and implementing the Plan. Our hourly rate is \$220 per hour inclusive of GST, with our advice preparation fee ranging from \$0 to \$20,000 inclusive of GST. The price can vary depending on the complexity of the advice and we will provide you with an estimate of the overall cost.
2. Service Based Charging – fee based on a fixed price agreement. This amount will vary based on the complexity of the advice.

Ongoing Service Fees

Our ongoing service fees vary depend on scope and complexity and range from 0.29% p.a. to 1% p.a. of the portfolio value inclusive of GST. Should you require additional services outside of the agreement with your adviser, an amount of up to \$220 per hour may apply.