

ABOUT YOUR ADVISER

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Authorisations

I am an authorised representative of Alliance Wealth Pty Ltd. I am authorised in the following financial services and products:

- Superannuation
- Pensions & Annuities
- Retirement Savings Accounts
- Cash & Term Deposits
- Managed Investments
- Investment Bonds
- Exchange Traded Products
- Government Debentures
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Aged Care
- Centrelink / Veterans' Affairs Assistance
- Business Insurance
- Insurance Claims Assistance
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary plus profit share

The following tables summarise the types of fees or commissions and indicative amounts that are applicable to the services that we provide. Before providing you with advice or services, I will agree with you the fees that apply. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up To
SoA Preparation Fee	\$10,000
Implementation Fee	\$4,750
Hourly Rate	\$475

Remuneration	Initial	Per Annum
Adviser Service Fee		\$2,750 to \$10,000
Insurance Commission*	0% to 66%^	0% to 35%

* 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.

Benefits, Interests and Associations

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

Related Parties	Nutshell Money - Nutshell Money is a subsidiary of Wallis-Smith Financial Services Pty Ltd, which provides a money coaching service.
	Victoria Wallis-Smith (Sam Wallis-Smith's wife) is the business owner and operator of Nutshell Money.
	Sam Wallis-Smith is a Director and beneficiary of Wallis-Smith Financial Services Pty Ltd. As a result, Sam Wallis-Smith may receive distributions and/or income from Nutshell Money.

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