

Financial Services Guide (Part Two)

1 January 2018

Your Adviser

Scott Levingston
Authorised Representative No. 343641

I am an authorised representative of Total Financial Solutions Australia Limited (TFSA).

My company, Seek Financial Advice Pty Ltd, is also an authorised representative (No. 343641) of TFSA.

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

The products I can advise you on:

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

My education qualifications and experience:

- Diploma of Financial Services (FP) (2009) – Aust College of Professionals.
- Bachelor of Economics (1993) – La Trobe University.
- Principles in Self Managed Super Funds – International Institute of Technology

How to find me:

My office is located at:
511, 12-14 Claremont Street
South Yarra VIC 3141

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

Phone: 1300 448 070
Mobile: 0419 720 885
Fax: 1300 448 071
Email: scott@seekfinancialadvice.com.au
Mail: PO Box 24
Balaclava VIC 3183

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 22% 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 between 90-100% will be passed on to your Adviser. Also, TFSA will receive ongoing payments of up to \$88 per annum (including GST), of which between 90-100%, will be passed on to your Adviser.

Ongoing Remuneration

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 annual review meeting.

For standard ongoing advice, including managed investments, superannuation or IDPS products, we will charge between 0% - 3% (GST inclusive) or on an agreed flat fee level. Our fees vary depending on the complexity of the advice we provide.

In some cases and depending on your personal circumstances, the ongoing annual advice fee can be collected or offset through the product issuer. Where there are funds held under advice, the ongoing Financial Planner service fee will be no more than 3% per annum or on an agreed flat fee level and where discussed with your Financial Planner this cost can be offset against the ongoing advice service charge for the year.

Referrals

If you were referred to me or Seek Financial Advice Pty Ltd, we may pay the person who referred you between \$0 and \$550 (incl GST). We 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.