

This Adviser Profile dated 22 January 2026 is issued by Lifespan Financial Planning Pty Ltd (Lifespan), which holds Australian Financial Service Licence number 229892. This Adviser Profile forms part of the Lifespan Financial Services Guide (FSG) dated 8 December 2023. These documents should be read together. This document contains information regarding the Adviser listed below and is designed to help you to make an informed decision about the financial advice provided to you by the Adviser.

Lifespan has authorised its authorised representatives to provide this document to you.

<p>Seek Financial Advice Pty Ltd is a Corporate Authorised Representative (ASIC No. 343641) of Lifespan Financial Planning Pty Ltd (AFSL: 229892)</p> <p>Scott Levingston is an Authorised Representative (ASIC No.343640) of Lifespan Financial Planning Pty Ltd (AFSL: 229892).</p>	<p>Address: 12/60 Albert Road South Melbourne 3205 Tel: 1300 448 070 Mobile: 0419 720 885 Email: scott@seekfinancialadvice.com.au</p>
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Your Adviser

Scott G Levingston is a Financial Adviser, an Authorised Representative of Lifespan Financial Planning Pty Ltd (Lifespan) and a Director of Seek Financial Advice Pty Ltd, a Corporate Authorised Representative of Lifespan Financial Planning Pty Ltd.



Your Adviser's Authorisations

Scott is authorised to provide advice in relation to the following financial products:

- Deposit and Payment Products
- Government Debentures, Stocks or Bonds
- Life Products
- Managed Investment Schemes
- Retirement Savings Account Products
- Securities
- Superannuation All
- Tax (financial) advice services

This means that Scott can assist you in meeting your financial planning needs and objectives in these areas, which include personal insurances, saving and investment as well as superannuation, retirement planning strategies and tax (financial) advice services.

Other Services

In addition to the services provided under Lifespan as described above, Scott also operates another business and provides additional services which do NOT involve Lifespan in any way.

Mortgage Link Australia Pty Ltd ABN 350 090 860 058 – provides Mortgage Broking Services.

Lifespan is NOT responsible for advice and work associated with products and services where he/she is not acting as an authorised representative of Lifespan.

Your Adviser's Experience

Scott has been involved in financial services for over 25 years advising clients about managing their wealth including investments, superannuation, retirement incomes, estate planning and personal insurances.

Graduate Diploma of Financial Planning (2020) - Kaplan
FASEA Financial Adviser Exam (2019) - FASEA Financial Standards Authority

Diploma of Financial Services (FP) (2009) - Aust College of Professionals

Bachelor of Economics (1993) - La Trobe University
Principles in SMSF Self

Managed Super Funds - International Institute of Technology

Diploma of Finance and Mortgage Broking -AAMC
Scott is a member of the AIOFP.

Outside of the office Scott enjoys sports, family and friends. He has an extensive sports background.

Cost of Advisory Services

An initial meeting to discuss your financial circumstances is free of charge. At this meeting Scott will establish how he can assist you and gather the information required to prepare a financial plan.

Scott will discuss the fee basis with you and agree on the method of charging prior to any advice is provided or cost incurred. Also, fees are fully disclosed in the Statement of Advice and Product Disclosure Statements.

Payment can be collected through superannuation, a platform, by direct debit or invoiced. A fee for the preparation of the Statement of Advice will be charged even if the recommendation is not implemented. For insurance, the commission may be paid by the insurance provider. Further advice that includes portfolio reviews may be charged on a percentage fee basis which varies according to the portfolio amount, or as a fixed dollar amount depending on the complexity and structure, as agreed with your adviser.

Fee Schedule

Preparation of Statement of Advice (SoA) (depending on complexity)	\$2,200 to \$10,500
Implementation Fee (depending on complexity and portfolio size)	\$500 to \$4,500
Further Advice (Review(s)) Part of ongoing service agreement where applicable OR as a separate fee	Flat fee between \$200.00 per month and \$500.00 per month. Percentage between 0.5% and 2.2%.
Hourly rate	\$595
Insurance Upfront commission Renewal commission *% based on amount of premium and is paid by the insurance provider	Up to 66%* Up to 33%*

All fees include 10% GST.

All fees are payable to Lifespan.

Lifespan retains 0% and pays Seek Financial Advice Pty Ltd 100%. Scott receives 100% as a director/shareholder of Seek Financial Advice Pty Ltd and is entitled to a Director's drawing, salary and/or dividend if and when paid.

Example for Investment or Superannuation Advice

If you receive advice regarding an investment or superannuation of \$100,000, the SoA fee could be \$3,600, of which 100% is paid to Seek Financial Advice Pty Ltd. If you agreed on an annual review arrangement the review could be a fixed dollar

amount of \$350.00 per month of which 100% is paid to Seek Financial Advice Pty Ltd

Example for Risk Products

If you receive advice regarding insurance, the SOA fee could be \$3,600 of which 100% is paid to Seek Financial Advice Pty Ltd. If the SOA is completed for insurance commissions only then 100% of the insurance commission is paid to Seek Financial Advice Pty Ltd

If the policy is cancelled in the first two years ('responsibility period') you will be liable for the portion of the commission clawed back. If you take out a life insurance policy with an annual premium of \$1,500, assuming the highest commission for the Upfront Option is selected at 66%, the upfront payment to Lifespan would be \$990, of which 100% is paid to Seek Financial Advice Pty Ltd. The maximum renewal commission for the Upfront Option is currently 22% per annum which could result in a payment of \$330 per annum for as long as the policy remains in force, of which 100% is paid to Seek Financial Advice Pty Ltd. Where a level commission option is selected, it could be as much as 33%, or \$495, of which 100% is paid to Seek Financial Advice Pty Ltd. This commission has what is called a 'responsibility period' imposed by the risk product issuer. This means that if the policy is cancelled within the first 1-2 years of inception commission is returned to the product issuer by Lifespan

Referral Fees

Seek Financial Advice Pty Ltd may pay the person who referred you to us a fee in relation to that referral which will be detailed in the SOA. Usually between 10%-20% of fees and commissions received by us. Should we refer you to another provider, we may receive a fee for the referral.