



SMSF ADVISERS NETWORK PTY LTD

ABN 64 155 907 681 AFSL No. 430062
29-33 Palmerston Crescent, South Melbourne Vic 3205
Ph: 1800 906 456 / 03 8548 8300
Website: www.smsfadvisersnetwork.com.au

FINANCIAL SERVICES GUIDE ADVISER PROFILE & FEE SCHEDULE

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FSG Part 2 of 2

Who Are We?

Business Name: Lockwoods SMSF Advice Pty Ltd
Address: 486 High Street
Echuca, VIC 3564
Postal Address: 486 High Street
Echuca, VIC 3564
Phone Number: (03) 5481 2911
Fax Number: (03) 5481 2999
Website: www.lockwoods.com.au
Email: brendan.hogan@lockwoods.com.au

Lockwoods SMSF Advice Pty Ltd (ABN 46 612 049 742) is a Corporate Authorised Representative No. (124 4433) of the SMSF Advisers Network Pty Ltd.

Lockwood Partners provides a range of Business Advisory Services, SMSF and financial advisory services, specialising in medium to large business clients. We pride ourselves in taking the time to get to know our clients and always being responsive to their needs. All staff live and work in the region and are proud to immerse themselves in the local communities.

Please be aware that Lockwood Partners is a business that may be associated with the provision of our advice to you. As a result of this association, the below listed Authorised Representatives may benefit from the payment of fees to Lockwood Partners in addition to the fees charged for advice provided under SMSF Advisers Network Pty Ltd. Confirmation and details of the fees involved where this arrangement is applicable, is included in your Statement of Advice.

Details of Authorised Representatives of the SMSF Advisers Network Pty Ltd who can provide you with financial advice within our office are as follows:

Brendan Hogan CA

Director/Partner

Authorised Representative No:001244432

Email: brendan.hogan@lockwoods.com.au

Brendan has been involved in the financial services industry for over 25 years. After graduating with a Bachelor of Business he qualified as a Chartered Accountant and has held a Public Practice Certificate with CA Australia and New Zealand for more than 15 years. Having completed studies in superannuation and Self-Managed Superannuation to meet the ASIC criteria to provide personal advice Brendan looks forward to continuing to provide his clients with advice regarding their superannuation needs.

Brendan Hogan is remunerated by means of salary.

Nigel Berryman CPA

Associate

Authorised Representative No:001244434

Email: nigel.berryman@lockwoods.com.au

Nigel has been involved in the financial services industry for 17 years. After graduating from La Trobe University with a Bachelor of Business he qualified as a CPA to provide accounting services to clients ranging from personal issues to catering for a range of small business needs. Having completed studies in superannuation and Self Managed Superannuation to meet the ASIC criteria to provide personal advice, Nigel looks forward to continuing to provide his clients with advice regarding their superannuation needs.

Nigel Berryman is remunerated by means of salary.

Your Adviser, as detailed above can provide strategic advice in the following areas:

- Basic Deposit Products; and
- Superannuation (including Self-Managed Superannuation Funds).

How we charge

Fees are charged according to the work undertaken by your adviser and may be charged on an hourly basis or as a flat fee, or as a combination of both. A fee may be charged for the initial work in developing and implementing a strategy, as well as for ongoing monitoring and reviews.

Hourly Rates

A typical rate for fee for service arrangements is between \$100.00 and \$400.00 per hour plus GST.

Advice Preparation Fee

This is a once off fee charged for the preparation of the advice provided. Professional Advice Fees depend upon the type of advice required and can typically range from \$500.00 to \$1,500.00 plus GST. The cost will be determined by the advice requirements. This fee is applicable even if you decide not to proceed with the advice provided

Implementation Fees

To implement our advice, we may charge a fee. This fee is typically between \$200.00 to \$2,500.00 plus GST depending on the advice strategies and time involved.

Ongoing Advice Fees

We offer an ongoing review service to ensure you are on track to achieving your goals and objectives as well as addressing any issues that may arise. The cost of this service will vary depending on your level of service required or selected. This fee can range between \$300.00 and \$1,500.00 plus GST per annum

Details of all fees will be clearly outlined in the Statement of Advice.

All fees are paid directly to SMSF Advisers Network who then pays the income to the Authorised Representative on a bi-monthly basis.

Referral Fees

SMSF Advisers Network Pty Ltd and its Authorised Representatives may work closely with many professional people and organisations such as solicitors to assist in providing you with advice.

Where we receive referrals from these sources, there may be a referral fee paid or received. Referral fees are not a separate charge to you. Referral fees will be disclosed to you at the time of referral and/or will be detailed in your Statement of Advice

We currently do not have any referrals in place.