



# SMSF ADVISERS NETWORK PTY LTD

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## FINANCIAL SERVICES GUIDE

### ADVISER PROFILE & FEE SCHEDULE

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FSG Part 2 of 2

#### Who Are We?

**Business Name:** Sunny Coast Accountants  
**Address:** 11B Garnet Street  
COOROY QLD 4563  
**Postal Address:** Po Box 415  
COOROY QLD 4563  
**Phone Number:** (07) 5485 1104  
**Website:** [www.sunnycoastaccountants.com.au](http://www.sunnycoastaccountants.com.au)  
**Email:** [info@sunnycoastaccountants.com.au](mailto:info@sunnycoastaccountants.com.au)

Sunny Coast Accountants Pty Limited (ABN 85 611 154 851) is a Corporate Authorised Representative No. 125 8649 of SMSF Advisers Network Pty Ltd.

Sunny Coast Accountants provides a range of accounting, taxation and SMSF advisory services. We pride ourselves on taking the time to get to know and understand our clients. All staff live and work in the region and are proud to immerse themselves in the local communities.

Please be aware that *Sunny Coast Accountants* 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 *Sunny Coast Accountants* 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, will be 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:

**Sarah Keily** B.Bus (Acc & Fin Plan), CPA

**Director**

**Authorised Representative No:** 125 8650

**Email:** [sarah@sunnycoastaccountants.com.au](mailto:sarah@sunnycoastaccountants.com.au)

Sarah has been working with Self Managed Superannuation Funds since she completed her Bachelor of Business (Accounting & Financial Planning) at the University of the Sunshine Coast. Sarah is also a qualified CPA. Having completed studies in superannuation and Self Managed Superannuation to meet the ASIC criteria to provide personal advice, Sarah looks forward to continuing to provide her clients with advice regarding their superannuation needs.

Sarah Keily is remunerated by means of salary.

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Association

Please note that no commissions from product providers are received by any Authorised Representative of the SMSF Advisers Network Pty Ltd.

**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 \$250 and \$300 per hour plus GST.

### **Advice Preparation Fee**

This is a one-off fee charged for the preparation of the advice provided. Professional Advice Fees can range from \$900 to \$1,500 plus GST. The cost will be determined by the advice provided and your 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 \$300 to \$1,100 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 \$1,200 and \$1,800 plus GST per annum.

Details of all fees will be clearly documented in the Statement of Advice you receive.

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 and clubs 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.