

Entire Financial Solutions Financial Services Guide

ABN 28 933 828 130 Authorised Representative No: 446209

Version number: 21.02

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited Financial Services Guide (FSG) 25 March 2022 and should be read in conjunction with Part One of our FSG dated 1 June 2021. Together these documents form the complete FSG.

EB Trading Trust trading as Entire Financial Solutions is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG are authorised by Count to provide personal advice through Entire Financial Solutions.

Our firm's adviser(s) listed below will provide the financial services set out in this guide, in their capacity as Authorised Representatives of Count.

Our contact details:

Address: Level 1, 5 Lutana Street, Buddina QLD 4575

Phone: 07 5444 2549

Fax: 07 5636 0954

Email: admin@entirefinancialsolutions.com.au

Web: www.entirefinancialsolutions.com.au

Effi Bowtell

Authorised Representative Number: 324197

Effi is an Authorised Representative of Count and a director of Entire Financial Solutions and receives a Salary.

Effi has 14 years of experience in the provision of financial advice. Effi attained her Advanced Diploma of Financial Services (Financial Planning) from Mentor on 14 April 2010. She is a Fellow Chartered Financial Practitioner (FChFP) of the Association of Financial Advisers. Effi is accredited to provide Self-Managed Superannuation Fund advice.

Effi is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Margin lending, and
- Superannuation.

How to contact me: admin@entirefinancialsolutions.com.au or 07 5444 2549

Haden Lacey

Authorised Representative Number: 1238473

Haden is an Authorised Representative of Count and employee of Entire Financial Solutions and receives a salary plus a bonus payable if key performance indicators are met.

Haden has 5 years of experience working in financial advice.

Haden attained his Bachelor of Commence (Accounting and Financial Planning) from Griffith University on 9th December 2013 as well as his Certificate IV in Finance and Mortgage Broking from Kaplan on 30th of December 2017. Haden successfully completed and graduated with his Masters of Financial Planning in January 2022 from Griffith University. He is a member of the Financial Planning Association of Australia.

Haden is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities, and
- Superannuation.

How to contact me: haden@entirefinancialsolutions.com.au or 07 5444 2549

Kym Vivian

Authorised Representative Number: 250378

Kym is an Authorised Representative of Count and employee of Entire Financial Solutions and receives a Salary plus a bonus payable if key performance indicators are met.

Kym has 24 years of experience in the provision of financial advice. Kym completed study for the 8 units of the Advanced Diploma of Financial Services (Financial Planning), which he studied with Deakin University and Kaplan Professional, on 14 December 2017. He has a Diploma of Financial Services (Financial Planning), which he achieved on 14 May 2007. He is a current member of the Association of Financial Advisers (AFA). Kym is accredited to provide Self-Managed Superannuation Fund advice.

Kym is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities, and
- Superannuation.

How to contact me: kym@entirefinancialsolutions.com.au or 07 5444 2549

Advice preparation and implementation fees

Prior to the provision of personal advice, we will agree upon a preferred payment option and disclose how our fee is calculated. Below is a summary of our available payment options that can be combined to pay for our services. We will provide you with a quote for our services before we undertake any work on your behalf.

These fee options include:

Time based charging

- i) The fee for the preparation and implementation of our advice is calculated based upon the time

we spend developing the plan. Our hourly rate is \$440 per hour (incl. GST).

Price can vary depending on scope and complexity of the advice and we will provide you with an estimate of the overall cost. If extra charges apply, then we will inform you before proceeding with any work.

Service based charging

- ii) The fee for the preparation and implementation of our advice is calculated based upon a fixed price agreement. This fixed dollar amount will vary based upon the complexity of advice being provided and agreed upon prior to commencement. Our minimum fee for this is s \$2,200 (incl. GST) minimum amount up to a maximum of \$20,000 (incl. GST)

If you decide not to implement our recommendations, the fee for the preparation of the Statement of Advice will be payable in full.

Supplementary service fees

For supplementary services, such as the provision of general research material or the completion of administrative tasks, our fee will be calculated on a time basis of \$440 per hour.

Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.

Ongoing service fees

Our ongoing advice fees vary depending on scope and complexity and range from \$2,200 to \$20,000 (incl. GST) unless otherwise agreed. The exact cost of the ongoing review service will depend on the review offering we recommend and this will be disclosed within the Ongoing Service Agreement we provide to you.

Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$440 per hour, may be applied.

Non-advised transaction fees

If we assist you on an execution only basis (ie where you have been offered and declined advice), a fee of up to \$150.

Other third-party payments we may receive

We may also receive the following fees, which are not payable by you.

Stamping Fees

Where we facilitate Share Placements and Initial Public Offers in relation to ASX-listed Direct Equities (i.e. Shares - this excludes Listed Investment Companies and Trusts), we may receive up to 1.5% of the transaction value as "stamping fees".

Insurance Commissions

Where we facilitate the acquisition, or modification of a Life Insurance product, we may receive commissions as described in Part 1 of this FSG.

Where we provide advice in relation to the above transactions and charge an advice fee, we may choose to rebate part or all of the third-party payment, to you.
