

AHS FINANCIAL

Financial Services Guide

ABN 24 188 368 900 | Corporate Authorised Representative No: 419245

Version number: 24.02

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count) Financial Services Guide (FSG) dated 1 March 2024 and should be read in conjunction with Part One of our FSG dated 1 March 2024. Together these documents form the complete FSG.

TFG Financial Pty Ltd trading as **AHS Financial** is an Authorised Representative of Count Financial Limited (Count).

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

Our contact details:

Address: 293 Royal Parade, Parkville, VIC 3052

Phone: 03 9480 1144

Email: admin@ahsfinancial.com.au

Web: www.ahsfinancial.com.au

HEIDI SCHWEGLER

Authorised Representative Number: 319157

Heidi is an Authorised Representative of Count and a Subcontractor of TFG Financial Pty Ltd trading as AHS Financial, and receives all fees and commissions paid to Count.

Heidi has over 17 years of experience in the provision of financial advice. Heidi attained a Financial Planning degree from RMIT in 1999. She is a Certified Financial Planner and a member of the Financial Advice Association of Australian (FAAA).

Specialist accreditations:

Heidi is authorised to provide advice in the following areas:

- Self-Managed Superannuation Funds
- Aged Care

Financial services and product types:

Heidi is authorised to provide advice in the following areas:

- Deposit and Payment Products
 - Deposit and Payment Products - Non-basic Deposit Products
 - Deposit and Payment Products - Non-Cash Deposit Products
- Government Debentures, Stocks or Bonds
 - Government Debentures, Stocks or Bonds
- Life Products
 - Investment Life Insurance Products
 - Life Risk Insurance Products
- Managed Investment Schemes

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- Managed Investment Schemes, including IDPS
 - Retirement Savings Account Products
 - Retirement Savings Account Products
 - Securities
 - Securities
 - Superannuation
 - Superannuation - All
 - Margin Lending Facility
 - Standard Margin Lending Facility

How to contact me: hschwegler@ahsfinancial.com.au or 0430 444 338

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:

Service based charging

- i) 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 \$2,750 (incl. GST).

Advice Preparation Fees

Fees for the preparation of your advice may range from \$2,750 to \$6,600 (incl. GST).

Advice Implementation Fees

Fees for the implementation of your advice may be a set fee between \$0 and \$2,200 (incl. GST).

The exact amounts of fees and charges and initial and ongoing commissions for the products you have purchased as a result of my recommendation to you will be detailed in your Statement of Advice.

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 \$660 per hour (incl. GST).

Fixed Term service fees

Our fixed term advice fees vary depending on scope and complexity and range from \$1,650 and \$7,700 payable in one lump sum or in instalments (incl. GST) unless otherwise agreed. The exact cost of the fixed term review service will depend on the review offering we recommend and this will be disclosed within the Fixed Term Service Agreement we provide to you.

Other third-party payments we may receive

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

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.
