

# ABOUT YOUR ADVISER

## Cathleen Shimmin | AR No.296262

Shimmon Investments Pty Ltd T/A Holistic Financial Planning | CAR No.1299765

**Address** 153-165 Henley Beach Road Mile End SA 5031

**Telephone** 1300 209 422

**Email** cathy@holisticfp.com.au

**Website** www.holisticfinancialplanning.com.au/

### Authorisations

I am an authorised representative of Matrix Planning Solutions Ltd. I am authorised in the following financial services and products:

- Superannuation
- Pensions & Annuities
- Retirement Savings Accounts
- Cash & Term Deposits
- Deposit and Payment Products
- Managed Investments
- Exchange Traded Products
- Investment Bonds
- Government Debentures
- Listed Securities (shares & other products)
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Centrelink / Veterans' Affairs Assistance
- Budgeting and Cashflow Management
- Debt Management

### Remuneration

I am remunerated by:

- Salary

The following tables summarise the types of fees or commissions that are applicable to the services I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up To
SoA Preparation Fee	\$3,300
Hourly Rate	\$250

Remuneration	Initial	Per Annum
Adviser Service Fee	\$0	\$0 to \$13,500
Adviser Service Fee (asset based)*	0%	0% to 1.1%
Insurance Commission*	0% to 66%^	0% to 33%

\* Based on a % of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

For example, a 1% Adviser Service Fee based on a \$200,000 investment would equal a \$2,000 fee payable.

### Benefits, Interests and Associations

The business and I do not have any related parties, shareholdings or referral arrangements that may influence my advice.

# ABOUT YOUR ADVISER

## Shaun Johnson | AR No.242192

Shimson Investments Pty Ltd T/A Holistic Financial Planning | CAR No.1299765

**Address** 153-165 Henley Beach Road Mile End SA 5031

**Telephone** 1300 209 422

**Email** sjohnson@holisticfp.com.au

**Website** www.holisticfinancialplanning.com.au/

### Authorisations

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- Superannuation
- Pensions & Annuities
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- Managed Investments
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### Benefits, Interests and Associations

The Business, associated entities or I have arrangements with the following parties.

Shareholdings	Clearview
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Where arrangements include payments or benefits these will be disclosed to you in writing at the time of providing advice.