

# **ABOUT YOUR ADVISER**

**Philippa Cassidy | Authorised  
Representative Number 341289**

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Intas Financial Services Pty Ltd (ABN 79 140 278 771 | AFSL 343939) authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the Intas Financial Services Pty Ltd Financial Services Guide (FSG).

## ABOUT ME

I commenced my career as a financial adviser in 1994 and became a representative of Intas Financial Services Pty Ltd on 1 June 2015.

I hold the following qualifications:

- Bachelor of Commerce
- Diploma of Financial Planning

I have met the following Financial Advisers Standards and Ethics Authority (FASEA) requirements:

- Education standard
- Passed the Financial Advisers Exam

I hold the following memberships:

- Association of Financial Advisers

I am authorised to provide the following financial services:

Superannuation and Retirement Planning
Personal Superannuation
Pensions and Annuities
Self-Managed Superannuation
Centrelink / Veterans' Affairs Assistance
Aged Care
Wealth Creation and Investments
Deposit Products
Investment Bonds
Managed Investments
Exchange Traded Products
Listed Securities (Shares and other products)
Wealth Protection
Personal Insurance
Business Insurance
Insurance Claims Assistance

## Other Financial Planning Services

Budgeting and Cashflow Management  
Debt Management  
Estate Planning Assistance

## My remuneration

I am remunerated by:

- Salary and a share of revenue subject to meeting and/ or obtaining certain compliance, education, and performance standards

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration Type	From	To
SoA Preparation Fee	\$0	\$13,200
Hourly Rate	\$330	
Remuneration Type	Initial	Ongoing (pa)
Adviser Service Fee	\$0 to \$13,200	\$0 to \$13,200
Insurance Commission*	0% to 66%^	0% to 35%

\*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.

## Benefits, interests and associations

The business, associated entities, or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.