



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: Abbey Partners Pty Ltd
Address: 42 Parsonage Road
Castle Hill NSW 2154
Phone Number: (02) 8624 3111
Website: www.abbeypartners.com.au
Email: admin@abbeypartners.com.au

Abbey Partners Pty Ltd (ABN 17 605 925 666) is a Corporate Authorised Representative No. 124 8685 of SMSF Advisers Network Pty Ltd.

Abbey Partners is a Chartered Accounting firm located in Castle Hill. We provide compliance services and tax advice to small to medium business and property investors. We take the time to meet with our clients in order to learn about their businesses and tax affairs so we can provide specific tax advice to our clients in order to minimise their tax obligations.

Please be aware that *Abbey Partners* 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 *Abbey Partners* 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:

Marina Makhoulf CA

Director

Authorised Representative No: 124 8686

Email: marina@abbeypartners.com.au

Marina has been providing SMSF advice to her clients for more than 15 years, is a Chartered Accountant with a Masters in Tax and has recently completed further studies in superannuation and Self Managed Superannuation Funds to meet the ASIC criteria to provide personal advice. Marina enjoys servicing clients in the construction and property development industry as well as mum and dad property investors, with some of her clients venturing into the business of property flipping. A keen property investor herself, Marina spends her spare time researching the property market. She also has a passion for soccer - both playing the game and supporting her beloved Western Sydney Wanderers in the A league.

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Association

Marina Makhoul is remunerated by means of salary.

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 \$200 and \$270 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 \$600 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 \$3,500 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.