

# ABOUT YOUR ADVISER

Gerard Sherlock | AR No.258320

The Sherlock Group (QLD) Pty Ltd T/A TSG Financial Solutions | CAR No.274610

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## 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
- Managed Investments
- Investment Bonds
- Exchange Traded Products
- Government Debentures
- Listed Securities (shares & other products)
- Margin Lending
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Gearing
- Centrelink / Veterans' Affairs Assistance
- Business Insurance
- Insurance Claims Assistance
- Budgeting and Cashflow Management
- Debt Management

## Remuneration

I am remunerated by:

- Salary plus bonus and profit share

The following tables summarise the types of fees or commissions and indicative amounts that are applicable to the services that we provide. Before providing you with advice or services, I will agree with you the fees that apply. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up To
Implementation Fee	\$5,500
Hourly Rate	\$440

Remuneration	Initial	Per Annum
Adviser Service Fee	\$0	\$0 to \$10,500
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 have arrangements with the following parties.

Referral Parties	Hall Browns Accounting
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Where arrangements include payments or benefits these will be disclosed to you in writing at the time of providing advice.