

# Aspire Financial Planning Group Pty Ltd

## Financial Services Guide

ABN 34 699 345 095 | Authorised Representative No: 444575

Version number: 21.02

### PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited Financial Services Guide (FSG) 29/03/2022 and should be read in conjunction with Part One of our FSG dated 01/06/2021. Together these documents form the complete FSG

Aspire Financial Planning Group Pty Ltd as trustee for AFPG Unit Trust is an Authorised Representative of Count Financial Limited (Count).

The individuals listed in this FSG is authorised by Count to provide personal advice through Aspire Financial Planning Group Pty Ltd.

#### Our contact details:

Address: 6/2404 Logan Road Eight Mile Plains QLD 4113

Phone: 07 3416 2792

Email: [admin@aspirefpg.com.au](mailto:admin@aspirefpg.com.au) Web: [www.aspirefpg.com.au](http://www.aspirefpg.com.au)

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#### Stephen Hubner

##### Authorised Representative Number: 318499

Stephen is an Authorised Representative of Count and the principal director of Aspire Financial Planning Group Pty Ltd.

Stephen has 30 years of experience in the provision of financial advice. Stephen has attained (FNS60410) Advanced Diploma of Financial Planning from The International Institute of Technology and a Diploma of Financial Services from the Investment Banking Institute. He is a practitioner manager of the Association of Financial Advisers.

Stephen is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Superannuation.

**How to contact me:** [stephen@aspirefpg.com.au](mailto:stephen@aspirefpg.com.au) or 0408 005 794

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#### Thirza Stacey

##### Authorised Representative Number: 1004236

Thirza is an Authorised Representative of Count and an employee of Aspire Financial Planning Group Pty Ltd and receives a salary.

Thirza has more than 20 years of experience in the Financial Services Industry. She holds an Advanced Diploma in Financial Planning, Self Managed Superannuation Fund and Margin Lending accreditations issued by Kaplan Professional.

Thirza is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Superannuation
- Margin Lending Facility

**How to contact me:** [thirza@aspirefpg.com.au](mailto:thirza@aspirefpg.com.au) or 0435 867 663.

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### 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 \$1,650.00 (incl. GST) and up to a maximum of \$20,000.00 (incl. GST).

**If you decide not to implement our recommendations, the fee for the preparation of the Statement of Advice will be payable in full.**

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### 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 \$110 per hour.

Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.

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### Ongoing service fees

Our ongoing advice fees vary depending on scope and complexity and range from \$1,320 minimum to a maximum of 0.99% (incl. GST) calculated as a percentage of the dollar amount advised upon unless otherwise agreed. The exact cost of the ongoing review service will depend on the review offering we recommend, and this will be disclosed within the Ongoing Service Agreement we provide to you.

Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$110 per hour, may be applied.

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### Non-advised transaction fees

If we assist you on an execution only basis (i.e., where you have been offered and declined advice), a fee of up to \$660.00 **OR** \$220.00 per hour will be applicable.

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### Other associations and relationships

Stephen Hubner is a director and shareholder of both Aspire Financial Planning Group Pty Ltd and The Aspire Accounting Group Unit Trust, The Redcliffe Practice Trust, The Kallangur Practice Trust, The Cleveland Practice Group Trust and Aspire Accountants & Advisors Pty Ltd, The Schubner Family Trust; and a shareholder of Aspire Finance Solutions Pty Ltd and AAA Bookkeeping which are separate entities.

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### 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.

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