Narellan Financial Planning Pty Ltd
Financial Services Guide

ABN 13 154 147 252 | **Authorised Representative No: 000410507**
Corporate Authorise Representative No: 001239890 **Version number: 24.01**

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count Financial) Financial Services Guide (FSG) 1 January 2024 and should be read in conjunction with Part One of our FSG dated 1 January 2024. Together these documents form the complete FSG.

Narellan Financial Planning Pty Ltd is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG are authorised by Count to provide personal advice through Narellan Financial Planning Pty Ltd.

Our contact details:

Address: 25a Richardson Road, Narellan NSW 2567
Phone: 02 4655 3340
Email: natalie@narellanfp.com.au

Natalie Nielsen

Authorised Representative Number: 000410507

Natalie is an Authorised Representative of Count and a Director of Narellan Financial Planning Pty Ltd and receives a salary only.

Natalie has 23 years of experience in the financial planning industry, 11 of these in the provision of financial planning advice. Natalie attained an Advanced Diploma in Financial Services on 20 June 2018 and a Diploma in Financial Services on 12 July 2010 from Kaplan Education Pty Ltd. She is a Member of Association of Financial Advisers Ltd (AFA)

Financial services and product types

Natalie 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: natalie@narellanfp.com.au or 02 4655 3340.

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: **Time based charging** i) The fee for the preparation and implementation of our advice is calculated based upon the time we spend developing the plan. Our hourly rate is $220 per hour (incl. GST). Price can vary depending on scope and complexity of the advice and we will provide you with an estimate of the overall cost. If extra charges apply, then we will inform you before proceeding with any work. **Service based charging** ii) 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 $3,300 (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.
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 $220 per hour. Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.
Ongoing & Fixed Term service fees	Our ongoing and fixed term advice fees vary depending on scope and complexity and range from $3,300 to $6,600 (incl. GST) unless otherwise agreed. The exact cost of the ongoing/fixed term review service will depend on the review offering we recommend and this will be disclosed within the Ongoing or Fixed Term Service Agreement we provide to you. We will recommend an appropriate review package in light of your circumstances. Should you require any additional services outside of any agreement between you and your adviser, an amount of up to $220 per hour, may be applied.
Non-advised transaction fees	If we assist you on an execution only basis (ie where you have been offered and declined advice), a fee of up to $220 per hour will be applicable.
Other associations and relationships	Your adviser Natalie Nielsen is a Director and holds financial interest in Underground Alliance Pty Ltd.
Other third-party payments we may receive	We may also receive the following fees, which are not payable by you. **Stamping Fees** Where we facilitate Share Placements and Initial Public Offers in relation to ASX-listed Direct Equities (i.e. Shares - this excludes Listed Investment Companies and Trusts), we may receive up to 1.5% of the transaction value as “stamping fees”. **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.