

ABOUT YOUR ADVISER

Ellen Mooney | AR No.322703

Coastal Compass Pty. Ltd. T/A Coastal Compass Financial Planning | CAR No.1314132

Address 128 Yanchep Beach Road Yanchep WA 6035
Mobile 0439 177 712
Email ellen@ccfplans.com.au

Authorisations

I am an authorised representative of Matrix Planning Solutions Ltd. I am authorised in the following financial services and products:

- Superannuation
- Pensions & Annuities
- Self Managed Superannuation Funds
- Retirement Savings Accounts
- Cash & Term Deposits
- Managed Investments
- Investment Bonds
- Government Debentures
- Life Insurance
- Total & Permanent Disability Insurance
- Trauma Insurance
- Income Protection Insurance
- Centrelink / Veterans' Affairs Assistance
- Business Insurance
- Insurance Claims Assistance
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary plus 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).

The Dealer Group receives 7.5% of the fees and commission.

Remuneration	Up To
SoA Preparation Fee	\$8,800
Hourly Rate	\$275

Remuneration	Initial	Per Annum
Adviser Service Fee	\$0 to \$22,000	\$0 to \$22,000
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 and I do not have any related parties, shareholdings or referral arrangements that may influence my advice.