ABOUT YOUR ADVISER

Stephen Phillips | Authorised Representative Number 339938

Adviser Profile | 26/08/2024

Financial Framework ATF FF Unit Trust Pty Ltd

Corporate Authorised Representative Number 456867

BUSINESS CONTACT DETAILS

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About Me

I have been in the financial industry over 20 years and have had various roles including working as a financial planner for over 10 years. I enjoy helping clients achieve their lifestyle and financial goals so they can live their best life. Outside of work, I enjoy spending time with friends and family along with helping coach my nephew's footy team.

Authorisations

I am authorised in the following financial services and products:

- Deposit and Payments Products
- Debentures, Stocks or Bonds issued by a Government
- Life Products (Risk & Investment Products)
- Superannuation
- Interests in Managed Investment Schemes (incl IDPS)
- Retirement Savings Accounts
- Securities
- Tax (financial) Advice

Remuneration

I am remunerated by:

- Salary and bonus

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up to
SOA Preparation Fee	$30,000 or more
Implementation Fee	$30,000 or more
Hourly Rate	$220 - $700

Remuneration	Initial	Per Annum
Adviser Service Fee	Up to $30,000 or more	Up to $30,000 or more
Adviser Service Fee (asset based)*	Up to 2%	Up to 2%
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.

For example, a 1% Adviser Service Fee based on a $200,000 investment would equal a $2,000 fee payable.

Benefits, interests and associations

The financial planning business and I do not have related parties, shareholdings or referral arrangements that may influence my advice. Neither the business or I pay or receive referral fees.