



Date:

Client Name:

Address:

**Fee Disclosure Statement for the period \_\_\_\_\_ – \_\_\_\_\_**

Dear \_\_\_\_\_,

This Fee Disclosure Statement (FDS) is designed to outline all Ongoing Service Fees, received by Scott Haywood of Interprac Financial Planning, that you have paid for the twelve (12) months up to \_\_\_\_\_. This document also outlines the specific services you were entitled to receive as well as the services you actually received during this period under our Ongoing Service Arrangement with you.

The fees listed in this Fee Disclosure Statement are related to the ongoing service arrangement you have agreed to and these fees are separate to any ongoing commissions we receive from the products we have recommended that are not directly linked to the provision of the agreed ongoing services.

All amounts detailed in this Fee Disclosure Statement are inclusive of GST.

Ongoing service fees and payments received by us for the provision of your annual review	Amount
Ongoing Adviser Service Annual Review Fee - paid from your account with Summit Personal Superannuation Fund	\$_____
<b>Total Ongoing Service Fee</b>	<b>\$</b>

Services you were entitled to receive under our agreement	Service Level
Advice review/s (including advice documentation)	Annually

Services we provided to you under our agreement	Status	Date Provided
Advice review/s (including advice documentation)	✓	-

If you require any additional information or if you have any questions in relation to this Fee Disclosure Statement, please do not hesitate to contact us.

Yours Sincerely,



Scott Haywood

Authorised Representative No. 411439  
of InterPrac Financial Planning Pty Ltd AFSL No. 246638  
Phone - 1300 123 436  
Email - shaywood@haywoodfm.com.au  
Address – The Loft, 229 Lennox Street, Richmond VIC 3121

Date:

Client Name:

Address:

## Ongoing Service Agreement Renewal Notice

Dear \_\_\_\_\_,

As part of our service arrangement with you, the financial services regulations require that we request you to formally renew our Ongoing Service Agreement at least every two (2) years. To satisfy these obligations we request that you review the ongoing service agreement, and if you would like to renew our agreement, please sign and return this document within 30 days.

This will enable:

- You to receive our advice and services.
- Us to continue to receive payments either directly from you or through the product providers we work with to facilitate your ongoing service program.

It is important to note that if you do not confirm in writing your intention to renew our Ongoing Service Agreement within 30 days of the date on this notice, our agreement will terminate after a further period of 30 days (60 days from the date on this notice) after which Ongoing Service Fees charged to you under this agreement will cease and our obligation to continue providing the agreed services will also terminate.

Thank you for your continued patronage, we value the relationship that we have with you and look forward to continuing being of service to you in the coming 12 months and beyond.

Please contact our office if you have any questions about your services or this Renewal Notice.

The agreed services are to be provided by Scott Haywood, Authorised Representative No. 411439 of InterPrac Financial Planning Pty Ltd AFSL No. 246638.

Contact details:

Phone - 1300 123 436

Email - shaywood@haywoodfm.com.au

Address – The Loft, 229 Lennox Street, Richmond VIC 3121

Signed and agreed to by:

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Print name \_\_\_\_\_

Print name \_\_\_\_\_

Date            /    /

Date            /    /