# Venture Financial Advisers Financial Services Guide

**ABN 62 095 194 559**
**Authorised Representative No: 1286833**

**Version number: 23.00**

## PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count Financial) Financial Services Guide (FSG) 6 June 2023 and should be read in conjunction with Part One of our FSG dated 29 May 2023. Together these documents form the complete FSG.

Venture Financial Advisers Pty Ltd trading as Venture Financial Advisers is an Authorised Representative of Count Financial Limited (Count Financial).

The individuals listed in this FSG are authorised by Count Financial to provide personal advice through Venture Financial Advisers.

**Our contact details:**

Address: 61 Bull Street, Bendigo VIC 3550
Postal: PO Box 928, Bendigo VIC 3552
Phone: 03 5434 7600
Fax: 03 5407 1402
Email: venture@venturebendigo.com.au

Web: https://venturebendigo.com.au

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### Nicola Chaffe

**Authorised Representative Number: 452641**

Nicola is an Authorised Representative of Count Financial and a Director of Venture Financial Advisers, and receives a salary plus profit distributions.

Nicola has over two decades of experience in the provision of financial and accounting advice. Starting at Venture Financial Advisers in late 2012, Nicola has extensive experience in the provision of financial planning advice. Nicola attained a Graduate Diploma of Financial Planning from Kaplan Australia in 2014 and a Bachelor of Commerce with a major in Accounting from Monash University in 2005. She is a Certified Practising Accountant (CPA) of CPA Australia, and an Associate of the Financial Planning Association of Australia (FPA).

**Financial services and product types**

Nicola 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
- Aged Care
- Securities
- Margin lending
- Superannuation.

**How to contact me: n.chaffe@venturebendigo.com.au or via our support team on 03 5434 7600**

## Jakob van Dalen

**Authorised Representative Number: 1253730**

Jakob is an Authorised Representative of Count Financial and a shareholder of Venture Financial Advisers and receives a salary plus profit distributions.

Jakob has been working in the financial advice industry since 2016, and has provided personal financial advice since 2017. Jakob attained a Diploma of Financial Planning from Kaplan Australia in 2017 and a Bachelor of Business with a major in Sport Development and Management from La Trobe University in 2016. He is an associate of the Financial Planning Association of Australia (FPA).

Jakob 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
- Aged Care
- Securities
- Superannuation.

**How to contact me: j.vandalen@venturebendigo.com.au or via support team on 03 5434 7600**

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## Christopher Brame

**Authorised Representative Number: 1292128**

Chris is an Authorised Representative of Count Financial and a director of Venture Financial Advisers, and receives a salary plus profit distributions.

Starting at venture in 2013, Chris has over a decade of experience in the provision of financial and accounting advice. Chris attained his Authorised Representative status in 2021 following the completion of a Graduate Diploma of Financial Planning from Kaplan Professional. Chris also holds a Bachelor of Business (Accounting) from La Trobe University (2016).

Chris 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
- Aged Care
- Securities
- Superannuation.

**How to contact me: c.brame@venturebendigo.com.au or via our support team on 03 5434 7600**

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## Advice preparation and implementation fees

Prior to the provision of personal advice, we will agree via a Terms of Engagement the cost for advice which will be on a service based charging model.

**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 $2,750.00 (incl. GST).

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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 $132 to $484 per hour.

Venture also has a Centrelink Only offering ranging from $220 per hour, a fixed annual cost or service based charging for applications.

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Date of preparation: 6 June 2023

## Ongoing service fees

Our ongoing advice fees vary depending on scope and complexity and range from $1,100 to $12,100 (incl. GST) 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.

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 $484 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 $484 per hour will be applicable.

## Referral arrangements

We have a referral arrangement in place with the providers detailed below. If you use the services of these providers we will receive the corresponding fee disclosed in the below table for the referral of your business. This will be paid for by the relevant provider and is not an additional cost to you. Where fees are paid to Venture Financial Advisers no benefit is passed on to your Adviser.

| Referral partner | Description of referrer | Payment structure |
|---|---|---|
| Bell Potter (inc Desktop Broker) | Share Broking | If you use the services of Bell Potter, Venture Financial Advisers may receive up to 50% of brokerage for the referral of your business. This will be paid for by Bell Potter and is not an additional cost to you. |

We may refer you to a third party for advice or services. Should this occur, you are not obliged to consult the professional person we have suggested. If you wish to consult a non-referral partner, we can provide additional options.

## Other associations and relationships

Venture Financial Advisers has associations with the accounting firm AFS & Associates Pty Ltd, and the finance broking firm Venture Finance Services Pty Ltd trading as Endeavor Finance, which are both separate entities from Venture Financial Advisers. Referrals may pass between these entities.

Whilst there is no direct payment received by any party, there may be a potential financial benefit received by the owners of associated businesses as a result of fees charged for services provided to the referred party:

- AFS & Associates Pty Ltd holds an equity interest in Venture Financial Planning Pty Ltd who is 100% owner of Venture Financial Advisers Pty Ltd (trading as Venture Financial Advisers), and will receive profit distributions from this equity holding.

Venture Financial Planning Pty Ltd who is an equity owner in Venture Financial Advisers Pty Ltd holds an equity interest in Venture Finance Services Pty Ltd (trading as Endeavor Finance), and will receive profit distributions from this equity holding.

## 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.