



## **SMSF ADVISERS NETWORK PTY LTD**

ABN 64 155 907 681 AFSL No. 430062  
29-33 Palmerston Crescent, South Melbourne Vic 3205  
Ph: 1800 906 456 / 03 8548 8300  
Website: [www.smsf advisersnetwork.com.au](http://www.smsf advisersnetwork.com.au)

# **FINANCIAL SERVICES GUIDE ADVISER PROFILE & FEE SCHEDULE**

**v.PAR1137 - 2.0**

**FSG Part 2 of 2**

### **Who Are We?**

Business Name: J.F FAHEY & The trustee for J Fahey Accounting Trust & The Trustee for KJ Walsh F  
Address: 144 Queen Street,  
Ayr, QLD 4807  
Postal Address: PO Box 236,  
Ayr, QLD 4807  
Phone Number: (07) 4783 2444  
Website: <http://www.faheywalsh.com.au/>  
Email: [kayleen.walsh@faheywalsh.com.au](mailto:kayleen.walsh@faheywalsh.com.au)

FAHEY & WALSH (ABN 15 430 155 042) is a Corporate Authorised Representative No. (128 0993) of the SMSF Advisers Network Pty Ltd.

Fahey & Walsh provides a range of accounting, taxation, audit, SMSF and financial advisory services specialising in small to medium business clients. We pride ourselves on taking the time to get to know our clients, and always being responsive to their needs. All staff live and work in the region and are proud to immerse themselves in the local communities.

Please be aware that Fahey & Walsh is a business that may be associated with the provision of our advice to you. As a result of this association, the below listed Authorised Representatives may benefit from the payment of fees to Fahey & Walsh in addition to the fees charged for advice provided under SMSF Advisers Network Pty Ltd. Confirmation and details of the fees involved where this arrangement is applicable, is included in your Statement of Advice.

Details of Authorised Representatives of the SMSF Advisers Network Pty Ltd who can provide you with financial advice within our office are as follows:

**Kayleen Walsh** CPA

**Authorised Representative No:**001245387

**Email:** kayleen.walsh@faheywalsh.com.au

Kayleen has been involved in the financial services industry for over 15 years. After graduating from Charles Sturt University with a Bachelor of Business in Accounting and Finance, she qualified as a CPA and has held a Public Practice Certificate for more than 7 years. Kayleen is also a Registered Tax Agent, a member of the Chartered Accountants Australia & New Zealand, The Tax Institute, the National Tax and Accountants Association and the SMSF Association. Having completed her Diploma of Financial Planning in 2015, including superannuation and Self Managed Superannuation, in order to meet the ASIC criteria to provide personal advice, Kayleen is looking forward to being able to continue providing advice on superannuation to ensure her clients are able to meet their superannuation obligations and goals.

Kayleen Walsh is remunerated Partners Salary and Profit Share

**Your Adviser, as detailed above can provide strategic advice in the following areas:**

- Basic Deposit Products; and
- Superannuation (including Self-Managed Superannuation Funds).

### **How we charge**

Fees are charged according to the work undertaken by your adviser and may be charged on an hourly basis or as a flat fee, or as a combination of both. A fee may be charged for the initial work in developing and implementing a strategy, as well as for ongoing monitoring and reviews.

### **Hourly Rates**

A typical rate for fee for service arrangements is between \$150.00 and \$300.00 per hour plus GST.

### **Advice Preparation Fee**

This is a once off fee charged for the preparation of the advice provided. Professional Advice Fees depend upon the type of advice required and can typically range from \$600.00 to \$1,500.00 plus GST. The cost will be determined by the advice requirements. This fee is applicable even if you decide not to proceed with the advice provided

### **Implementation Fees**

To implement our advice, we may charge a fee. This fee is typically between \$300.00 to \$1,100.00 plus GST depending on the advice strategies and time involved.

### **Ongoing Advice Fees**

We offer an ongoing review service to ensure you are on track to achieving your goals and objectives as well as addressing any issues that may arise. The cost of this service will vary depending on your level of service required or selected. This fee can range between \$600.00 and \$2,000.00 plus GST per annum

Details of all fees will be clearly outlined in the Statement of Advice.

All fees are paid directly to SMSF Advisers Network who then pays the income to the Authorised Representative on a bi-monthly basis.

### **Referral Fees**

SMSF Advisers Network Pty Ltd and its Authorised Representatives may work closely with many professional people and organisations such as solicitors to assist in providing you with advice.

Where we receive referrals from these sources, there may be a referral fee paid or received. Referral fees are not a separate charge to you. Referral fees will be disclosed to you at the time of referral and/or will be detailed in your Statement of Advice

We currently do not have any referrals in place.