Camden Wealth Advisers Pty Ltd

Financial Services Guide

ABN: 61654002070 **Corporate Authorised Representative No: 1294245** **Version number: 24.04**

Part Two – Adviser Profile

This adviser profile is Part Two of the Count Financial Financial Services Guide (FSG) 1 January 2025 and should be read in conjunction with Part One of our FSG dated 1 March 2024. Together these documents form the complete FSG.
Camden Wealth Advisers Pty Ltd is an Authorised Representative of Count Financial Limited (Count).
The individual listed in this FSG is authorised by Count to provide personal advice through Camden Wealth Advisers Pty Ltd.

Our contact details:

Address: Suite 3 190 Argyle St Camden NSW 2570

Phone: 0401 041 932

Email: catherine@camdenwealthadvisers.com.au

Web: https://www.camdenwealthadvisers.com.au/

Catherine Beh

Authorised Representative Number: 465612

Catherine is an Authorised Representative of Count and a Director of Camden Wealth Advisers Pty Ltd and receives a salary only.
Catherine has over 10 years of experience in the provision of Financial Planning Advice. Catherine has attained a Bachelor of Social Science from UNSW in 1991, Diploma Education (Secondary) from University of Sydney in 1992, Adv Dip (Financial Planning) from Pinnacle Financial Services in 2014, Grad Dip (Psychology) from CSU in 2016 and completed all FASEA requirements in 2019. She holds an AFP designation with the Financial Advice Association of Australia (FAAA). Catherine is also accredited to provide SMSF & Aged Care advice.

Catherine 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
- Superannuation.
- Listed Securities

How to contact me: catherine@camdenwealthadvisers.com.au or 0401 041 932

Date of preparation: 1 January 2025

Consultation (meeting) fee	We charge a consultation (meeting) fee for in person appointments as follows: i) ***Fact Finding*** (Initial in person appointment): $275.00 (inclusive of GST). This covers up to 2 hours of consultation time. An invoice will be emailed prior to your meeting for payment. ii) ***Strategy Meeting*** (subsequent in person appointment): $275.00 (inclusive of GST. This covers up to 2 hours of consultation time. An invoice will be emailed prior to your meeting for payment. iii) ***Strategy Paper:*** $880.00 (inclusive of GST. This covers the provision of a Strategy Paper outlining your current position and areas where advice may be required. This is not advice).
Advice preparation and implementation fees	Prior to the provision of personal advice, we will agree upon a preferred payment option and disclose how our fee is calculated. Below is a summary of our available payment options that can be combined to pay for our services. We will provide you with a quote for our services before we undertake any work on your behalf. These fee options include: 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 $3,300 (incl. GST) up to a maximum of $12,500 (incl. GST). If you decide not to implement our recommendations, the fee for the preparation of the Statement of Advice will be payable in full.
Supplementary service fees	For supplementary services, such as the provision of general research material or the completion of administrative tasks related to Centrelink, our fee will be calculated on a time basis of $330.00 per hour (incl. GST) with $660.00 (incl GST) minimum charge. Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.
Ongoing & Fixed term service fees	Our ongoing and fixed term service fees vary depending on scope and complexity and range from $3,300 (incl. GST) up to a maximum of $12,500 (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 or Fixed Term 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 $330.00 per hour (incl. GST) with $660.00 (incl GST) minimum charge may be applied.
Non-advised transaction fees	If we assist you on an execution only basis (i.e. where you have been offered and declined advice), a fee of $330.00 per hour (incl. GST) with $660.00 (incl GST) minimum charge.
Referral arrangements	I may refer you to a third party for advice or services. Should this occur, you are not

obliged to consult the professional person I have suggested. If you wish to consult a non-referral partner, I can provide additional options.

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.

CAMDEN
Wealth Advisers