This FSG Part 2 contains information specific to your adviser and should be read together with the FSG Part 1.
Merit Wealth Pty Ltd has authorised your adviser to distribute this FSG.

Who is providing the financial services?

Your Financial Adviser is Earl Inglis (Earl).

I am an Authorised Representative of Merit Wealth Pty Ltd AFSL 409 361 and am authorised by Merit Wealth Pty Ltd to provide the financial services described in this FSG.

My Authorised Representative number is 1286835.

What experience does your financial planner have?

Financial Planner, with 9 years of experience in the financial planning industry. Providing advice and support to clients to help them achieve their financial freedom.

A friendly personality committed to client goals with an ability to build mutually productive relationships.

Qualifications:
2021 - Ethics and Professionalism in Financial Advice
2021 - FASEA
2020 - Diploma of Financial Planning International Institute of Technology
2015 - Bachelor of Financial Advising University of Western Sydney

Employment History:
2022 – Current: Financial Adviser Merit Planning
2021 - 2022: Financial Adviser S & Y Private Wealth
2017 - 2021: Admin Assistant/paraplanner S & Y Private Wealth
2016 - 2017: Admin Assistant Mortgage Choice Financial Planning
2015 - 2015: Admin Assistant Yellow Brick Road Wealth Management

Does your adviser have any associations and conflicts of interest?

Merit Planning (Hills) Pty Ltd ABN 42 141 689 652 is an authorised representative (no. 415619) of Merit Wealth Pty Ltd ABN 89 125 557 002

Merit Planning (Hills) Pty Ltd may have referral arrangements with other professional service providers. If a client is referred to us, we may pay the referrer a fee or other benefit. We will record the details of any referral fees in the Statement of Advice we prepare for you. If we refer a client to another service provider they may pay us a referrer fee. We will only refer you to third party professionals, where we believe it is in your best interest to do so.

All fees and commissions are paid to Merit Planning (Hills) Pty Ltd.

Please refer to FSG Part 1, for further information on other relationships that might influence Count Limited (Count) in providing financial advice services, we will also disclose any associations or conflicts within the Statement of Advice, that we prepare for you.

What qualifications has your adviser completed?

Qualification Name
SMSF Regulation and Taxation
Accredited Listed Product Adviser Program
Diploma of Financial Planning
Postgraduate (Financial Planning) CPD Mapping - Ethics and Professionalism in Financial Advice

Authorised Products and Services

I am authorised in the following products and services:

Deposit and Payment Products – Basic Deposit Products

Government Debentures, Stocks or Bonds

Investment Life Insurance and Life Risk Insurance Products

Managed Investment Schemes including IDPS

Retirement Savings Accounts

Securities

Superannuation

Self-Managed Superannuation Funds

Direct Equities

Schedule of Fees

These fees should be used as a guide only. We will discuss your individual needs and agree our fees with you before we provide advice. The actual agreed fees will depend on the complexity of your circumstances, goals and needs and the scope of advice we provide. Our fees are set out below:

- Plan preparation and implementation fees. These are the fees you pay when you have agreed to receive our advice and will be between $0.00 and $0.00, inclusive of GST, depending on complexity and scope of advice.
- Annual Ongoing service fees. These are the fees you pay when you agree to receive our ongoing advice, and will be between $0.00 pa and $0.00 pa, inclusive of GST. Our ongoing services will be agreed with you in an ongoing services agreement.

How will your financial adviser be paid for the services provided?

All fees and commissions disclosed in the FSG which are attributed to the services provided to you by your adviser are paid to Merit Wealth Pty Ltd.

Merit Wealth Pty Ltd will pay up to 100% of those fees and commissions to Merit Planning (Hills) Pty Ltd.

Merit Planning (Hills) Pty Ltd may pass on up to 100% of those fees and commission to Earl Inglis.

I am an of Merit Planning (Hills) Pty Ltd and am remunerated through the payment of .

How can you contact your financial adviser?

Earl Inglis	Phone: 1300 827 439
Merit Planning (Hills) Pty Ltd	Mobile: 0466 819 295
Website:	Email: earl@meritfp.com.au
Office Address: 41/280 New Line Road Dural NSW 2158	Postal Address: PO Box 126 Round Corner NSW 2158

FSG Approved Date: 1/03/2024 8:30 AM