

Aspire Planning

Financial Services Guide

ABN 31 438 979 130 | Authorised Representative No:1235066

Version number: 24.02

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count) Financial Services Guide (FSG) 18 March 2024 and should be read in conjunction with Part One of our FSG dated 1 March 2024. Together these documents form the complete FSG.

Tim Henry Financial Pty Ltd ATF The Henry Family Trust trading as Aspire Planning is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG are authorised by Count to provide personal advice through Tim Henry Financial Pty Ltd ATF The Henry Family Trust trading as Aspire Planning.

Our contact details:

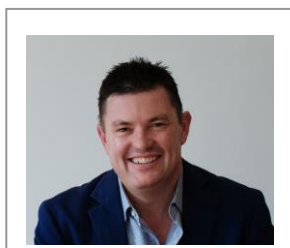
Address: 13/328 Reserve Road, Cheltenham Vic 3192

Phone: 03 9584 3343

Email: admin@aspireplanning.com.au

Web: www.aspireplanning.com.au

Timothy Henry



Authorised Representative Number: 334280

Timothy is an Authorised Representative of Count, an owner and Director of Aspire Planning, and receives remuneration from the commissions and fees received.

Timothy has been working in the financial services industry and providing financial advice services to clients since 2009.

Timothy attained Graduate Diploma Applied Finance (Financial Planning) from KAPLAN on 30th June 2009 and Graduate Certificate in Financial Planning from FINSIA on 1st November 2008 and Bachelor of Business (Banking and Finance) from MONASH UNIVERSITY. He is a Professional Member of the Financial Advice Association Australia (FAAA).

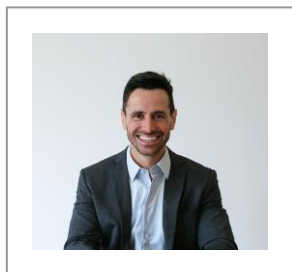
Timothy is a SMSF authorised adviser.

Timothy 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
- Securities
- Superannuation

How to contact me: tim@aspireplanning.com.au or 0407 327 501

Leandro Bonin



Authorised Representative Number: 1296409

Leandro Bonin is an Authorised Representative of Count and an employee of Aspire Planning and receives a salary from the commissions and fees received.

Leandro has been working in the financial services industry since 2006 and providing financial advice services to clients since 2022.

Leandro attained Graduate Diploma of Financial Planning from Kaplan Professional in December 2021, Diploma of Financial Planning from Monarch Institute in August 2017, Master of Business Administration (MBA) from Kaplan Business School in June 2017, and Bachelor of Business Administration from Mackenzie Presbyterian University in December 2016.

Leandro is a Professional Member of the Financial Advice Association Australia (FAAA). He is also an Aged Care accredited specialist and SMSF authorised adviser.

Leandro 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
- Securities
- Superannuation.

How to contact me: leandro@aspireplanning.com.au or 0452 625 998

David Gates

Authorised Representative Number: 300477

David is an Authorised Representative of Count and Aspire Planning and receives a salary plus bonus if the business meets its goals.

David has 38 years experience in the provision of financial planning advice. David attained the Diploma of Financial Services (Financial Planning) from Kaplan (Dip.FS (FP) on 30/10/2009. He became a Chartered Life Practitioner (ChLP) on 23/03/2016 through the Asia Pacific Financial Services Association

David 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.

How to contact me: admin@aspireplanning.com.au or 0430 592 438.

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 \$5,500 (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, our fee will be calculated on a time basis of \$550 per hour. Where you enter into an Ongoing Service Arrangement, Supplementary services are included as outlined within the Service Agreement provided to you, and will not be provided at an additional cost.							
Estate Planning facilitation fees	Fees for the facilitation of Estate Planning maybe a set fee ranging from \$2,000 to \$5,000. The exact cost of the service will depend on the review offering we recommend and this will be disclosed within the Service Agreement we provide to you.							
Ongoing & Fixed Term service fees	Our fixed term advice fees vary depending on scope and complexity and range from \$3,000 to \$10,000 (incl. GST) unless otherwise agreed. The exact cost of the fixed term review service will depend on the review offering we recommend and this will be disclosed within the Fixed Term Service Agreement we provide to you. Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$550 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 \$10,000 will be applicable.							
Referral arrangements	We have a referral arrangement in place with CareAbout Australia as detailed below. Where fees are paid to CareAbout no benefit is passed on to your Adviser. If you have been referred to us by CareAbout, and you use our services, CareAbout will receive 25% of the total initial fee for the referral of your business. This will be paid from the initial fees and total ongoing fees disclosed above and will not be an additional cost to you.							
	<table><tr><th>Referral partner</th><th>Description of referrer</th><th>Payment structure</th></tr><tr><td>CareAbout Australia</td><td>Referral agreement.</td><td>We pay 25% (exc. GST) of the initial fee as received as a result of client referrals from them.</td></tr></table>		Referral partner	Description of referrer	Payment structure	CareAbout Australia	Referral agreement.	We pay 25% (exc. GST) of the initial fee as received as a result of client referrals from them.
Referral partner	Description of referrer	Payment structure						
CareAbout Australia	Referral agreement.	We pay 25% (exc. GST) of the initial fee as received as a result of client referrals from them.						
	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. No benefit is passed on to us.							
Other associations and relationships	NIL							

**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.
