

Adviser Profile

The financial services offered to you by:

JODIE DOUGLAS (ASIC No. **435196**), as an Authorised Representative of MADISON FINANCIAL GROUP PTY LTD (“Madison”) and as a representative of:

MAD ABOUT LIFE PTY LTD ATF BLUE DOUGLAS INVESTMENT TRUST

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I have been working in the financial services industry since 2003 and providing financial services advice to clients since 2008. I have been a representative of Madison since 4 May, 2017. I hold the following qualifications/ Professional Memberships:

- Financial Services (Tier 1) Compliance Program – RG146
- Association of Financial Advisers Membership (AFA)

I am authorised by Madison to provide personal advice, general advice and to deal in:

- Deposit Products
- Non-Basic Deposit Products
- Government Debentures, Stocks and Bonds
- Life Insurance Investments Products
- Life Insurance Risk Products
- Managed Investments
- Retirement Savings Account Products
- Superannuation

As part of my services to you, I am able to provide advice on the following:

- Wealth Creation and Retirement Planning
- Personal and Corporate Superannuation
- Personal and Business Risk Insurance
- Managed Portfolio Services
- Centrelink Planning Advice
- Cash Flow and Debt Reduction Strategies
- Portfolio Review and Ongoing Service
- Estate Planning

How do we charge our clients for our services?

You have a choice of how our financial services can be paid for in the following manner,

- (a) A Statement of Advice fee between \$1,100 and \$5,500 (including GST) depending on complexity;
- (b) Ongoing Service fee between \$55 and \$380 per month;
- (c) An hourly financial planning advice rate of up to \$180;
- (d) Commission on Insurance Products (max. of 85% initial commission plus max. of 20% ongoing trail commissions). For example, if your premium amounted to \$2,000 we will receive up to \$1,700 in initial commission (\$2,000 x 85%) and up to \$400 in ongoing commission (\$2,000 x 20%).

For preparation of a strategy recommendation and implementation we quote our fees on an individual basis depending upon the type of advice required and the level of complexity. We will always advise you of our terms of engagement prior to commencing work on your behalf.

How are we paid?

- (a) All fees and gross commission payments are shared between our practice and Madison under a split sharing arrangement fixed at 95%. For instance every \$1,000 of income received by Madison will generate \$950 of income to us.
- (b) The practice in which I am employed receives fees and commissions from business generated, and remunerates me by way of trust distributions.
- (c) We are required to keep a Register of Alternative Remuneration which shows any payment other than fees and commissions which may be received by us from fund managers or product providers. This register is available for inspection with 7 days notice.

Important Note The Adviser Profile forms an essential part of the Financial Services Guide. Your Financial Services Guide is not complete without it.