



Blueprint Financial Solutions Financial Services Guide

ABN 30 560 599 296 | Authorised Representative No: 305044

Version number: 24.02

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count) Financial Services Guide (FSG) dated 1 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.

Blueprint Financial Solutions Pty Ltd (Rep No. 305044) is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG is authorised by Count to provide personal advice through Blueprint Financial Solutions Pty Ltd.

Our firm's adviser(s) listed below will provide the financial services set out in this guide, in their capacity as Authorised Representatives of Count.

Our contact details:

Address: 32 Sugar Gum Boulevard Greensborough Vic 3088
Phone: 0421 052 038 Office: 03 9432 7019
Email: shawn@bpfinancial.com.au Web: www.bpfinancial.com.au

Shawn French:

Authorised Representative Number: 300134

Shawn French is an Authorised Representative of Count and a Director of Blueprint Financial Solutions Pty Ltd and receives salary and Directors fees from the commissions and fees received.

Shawn French has 17 years of experience in the provision of Financial Advice.

Shawn French of Count attained Advanced Diploma of Financial Service (Financial Planning) from Tribeca on 8th of July 2005 and Fellow Chartered Financial Practitioner from Association of Financial Advisers on 28th February 2017 and Graduate Diploma of Financial Planning from Kaplan Professional on 18th November 2022. He is a Fellow Chartered Financial Practitioner of the association of Financial Advisers.

Shawn French is authorised to provide advice in the following areas:

- Deposit and Payment Products
- Government Debentures, Stocks or Bonds
- Life Products
- Managed Investment Schemes
- Retirement Savings Account Products
- Securities
- Superannuation

How to contact me: shawn@bpfinancial.com.au or 0421 052 038

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:

***Time based charging**

- i) The fee for the preparation and implementation of our advice is calculated based upon the time we spend developing the plan. Our hourly rate is \$275.00 per hour (incl. GST).

Price can vary depending on scope and complexity of the advice and we will provide you with an estimate of the overall cost. If extra charges apply, then we will inform you before proceeding with any work.

***Service based charging**

- ii) 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 \$1,650.00 (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 \$110.00 per hour (incl GST).

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 advice fees vary depending on scope and complexity and range from \$990.00 (incl GST) to \$3,300.00 (incl. GST) unless otherwise agreed. The exact cost of the ongoing/fixed term 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.

Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$275.00 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 \$275.00 per hour will be applicable.

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 associations and relationships

Shawn French is a Director/Shareholder of both Blueprint Financial Solutions Pty Ltd and Blueprint Mortgage Solutions Pty Ltd which are separate entities.

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.