Adviser Profile

Your Adviser:

Michael Voss, CFP
Authorised Representative No. 238253
Trading as Arrow Financial Advice

Michael Voss can be contacted at the above address and phone numbers.

Michael Voss is an authorized representative of Lionsgate Financial Group who is the holder of the Australian Financial Services licence number 342766. Lionsgate is responsible for the advice provided to clients by Michael Voss.

Educational Qualifications and Experience:

My personal professional qualifications are:

- Certified Financial Planner – Financial Planning Association of Australia
- Diploma of Financial Planning

I have worked as a financial planner since 1991.

Services Your Adviser can provide, include:

- Financial Planning;
- Retirement Planning;
- Rollover and Redundancy Advice;
- Superannuation Planning and Advice;
- Self Managed Superannuation Services;
- Managed, Self Managed and Direct Investment Advice;
- Tax Returns and Accounting Services;
- Deposits and Mortgages;
- Sharebroking Services;
- Centrelink Assistance;
- Estate Planning;
- Wealth Creation;
- Fund Research;
- Insurance and Risk Management;
- Business Succession Planning;
- Salary Sacrifice Planning;
- Investment Reviews;
- Executive Remuneration Planning;
- Managed Portfolio Services.

Lionsgate authorises Michael Voss to provide personal financial product advice on and/or to deal in the following financial products:

- Deposit and payment products limited to basic deposit products and deposit products other than basic deposit products;
- Debentures, stocks or bonds issued or proposed to be issued by a government and / or corporate entity;
- Life Products including: Investment Life Insurance Products and Life Risk Insurance Products;
- Interests in managed investment schemes including Investor directed portfolio services;
- Retirement savings accounts (“RSA”) products;
- Securities;
- Standard Margin Lending Facility;
- Superannuation; including Self-Managed, Retail, Corporate and Industry Superannuation.

The Authorised Representative’s fees and commission schedule:

The cost of providing a financial product or service to you will depend on the nature and complexity of the advice, financial product and/or service provided. The payment options for the provision of financial services will be discussed with you by your financial adviser and are as follows:

- Fee for service
- Implementation fees
- Transaction fees
- Commission
- Ongoing service fees
- Or a combination of the above depending on what best suits the client.

Please note that the type of payment option can also depend on the type of product and/or advice implemented and your financial adviser will discuss this with you.

Fee Schedule	Total (excluding GST)
Initial Consultation	$0 - $2,000
Hourly Rate	$0 - $500
Statement of Advice preparation and presentation	$0 - $10,000
Implementation Fee	0-5% of the amount of investment products being implemented
Ongoing management/review fees	0-5% pa of the amount of investment products or $0-$20,000 pa

All Advice and Servicing fees received for the financial services provided are paid to Lionsgate. As the authorising Licensee, Lionsgate charges the financial adviser a monthly fee and forwards the balance to the financial adviser.The distribution of this Financial Services Guide has been authorised by Lionsgate.

PLEASE RETAIN THIS DOCUMENT FOR YOUR REFERENCE FOR ANY FUTURE DEALING.