

Supplementary Financial Services Guide (Version 1.0 - July 2010)

Important



Before we provide you with financial advice, you should read this Supplementary Financial Services Guide (SFSG). It contains important information designed to help you decide whether to use our services.

This SFSG supplements the Financial Service Guide Version 12.0 - March 2011 issued by Graeme Drake Financial Services. It should be read in conjunction with that Financial Services Guide. The distribution of this SFSG has been authorised by Charter Financial Planning.

This SFSG provides you with information about commissions we may receive when we provide you with advice in relation to your Business / Corporate Superannuation Policy.

About Us



This SFSG is issued by Graeme Drake Financial Services.

Your financial adviser, Graeme Drake (ASIC number 249989), is an authorised representative of Charter Financial Planning.

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Fees we may receive



Business / Corporate Superannuation Commission

We may receive commission when we recommend a business/corporate superannuation fund to you.

One or all of the following commissions may be payable:

- Up to 5% of your contributions, rollovers and or transfers from other super funds
- Up to 1.35% per annum of your investment balance
- Up to 1% per annum of your investment balance

These amounts are deducted from your investment balance.

- Up to 20% per annum of the renewal premium, for any insurance held within your fund.

This amount is paid by the life company and factored into the cost of your insurance premium.