Investors Save Dollars Non Advisory Placement Service - Service Offering

We value your business and wish to confirm our **Service Offering** available to you as a 'Non-Advisory' client of Investors Save Dollars:

- Up to **100% rebate of upfront commission** (so you **never need to pay entry fees again** on any initial or ongoing applications) for investments in managed investment, superannuation, pension and annuity funds that you choose yourself. This means that up to 100% of your money is working for you straight away. This is a substantial saving to you compared with investing directly with the Fund provider as you would normally incur the full upfront fee – up to 4%. This rebate is normally given to you in the form of additional units in the Fund that you choose yourself.
- Complimentary **General Advice** and information at any time from the team of Financial Advisers at Investors Save Dollars. As a client, you are free to call our office and talk about your investments or any other issues. This is an invaluable service as you are able to find out answers to questions on complex legislative areas (such as the Super rules on retirement) from specialists in that field who are licensed, qualified, experienced and in the know.
- As a Non-Advisory client of Investors Save Dollars, you not only have the '**backing' of Count Wealth Accountants' No. 1 Member, but also the 'buying power' of Count Wealth Accountants itself**. We use this strength to support our clients on issues such as insurance claims, paperwork queries or any administration issues that may arise. Unfortunately often the harsh reality is that Fund Managers may not be as helpful to individuals as they are to clients of Count's No.1 Member Firm.
- We also offer a **complimentary Statement of Advice (Financial Plan)** if you have had over $500,000 invested with us (in product/s that pay us an Ongoing Adviser Service Fee) for a period of 12 months or more. In order to give you any "Personal" Advice, i.e. advice specifically tailored to your own goals, objectives or future planning, we need to ensure that any advice we give is appropriate to your own circumstances. We cannot do this of course until we have a basis for these recommendations and therefore need to know more about your financial circumstances and require a completed **Financial Needs Analyser** questionnaire from you prior to the preparation of any Personal Advice.
- You also gain access to our award winning **Loan & Leasing providers**. Cash Rebates are available for taking out a loan via us.
- Access to our DIY **Stockbroking Service**, a facility that lets you trade shares at competitive prices.
- Our **complimentary email newsletters**. These include up to date legislation changes, special offers and information that you might find both practical and interesting.
- You receive access to '**My Net Wealth**', a secure online service unique to Count Wealth Accountants. When you register you will have access to your very own personalised and secure My Net Wealth Homepage. Features include:
    - View all of your investment data consolidated into a single net wealth online statement
    - Access to product research & commentaries on your investments
    - View Count's investment market outlook