

# Leske Financial Advice Financial Services Guide

ACN 656 567 734 | Authorised Representative No: 1295296

Version number: 24.02

## PART TWO – ADVISER PROFILE

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

Leske Financial Advice Pty Ltd as trustee for Leske Financial Advice Trust trading as Leske Financial Advice is an Authorised Representative of Count Financial Limited (Count).

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: 22 Greenhill Rd, Wayville SA 5034

Phone: 0414 463 084

Email: [simon@leskefinancial.com.au](mailto:simon@leskefinancial.com.au)

Web: [leskefinancial.com.au](http://leskefinancial.com.au)

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### Simon Leske CFP®

#### Authorised Representative Number: 1003848

Simon Leske is an Authorised Representative of Count and a director of Leske Financial Advice, and receives fees paid by clients and insurance commissions from product providers.

Simon has over 36 years of experience in the provision of finance industry and 24 years' experience in the provision of financial planning advice. Simon attained Diploma of Financial Planning from Deakin University in 2003 and Certified Financial Planner Certification from Financial Planning Association in 2008. He is a Certified Financial Planner (CFP®) of the Financial Planning Association of Australia.

Simon attained his Aged Care accreditation in 2017 and Self-Managed Superannuation (SMSF) accreditation in 2013.

Simon is authorised to provide advice in the following areas:

- Deposit and payment products
- Government debentures, stocks and bonds
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Margin Lending, and
- Superannuation

How to contact me: [simon@leskefinancial.com.au](mailto:simon@leskefinancial.com.au) or 0414463084

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**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:

**Service based charging**

- i) 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 \$1,950 (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.

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**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 \$330 per hour.

Where you enter into an Ongoing Service Arrangement, Supplementary services are included, and will not be provided at an additional cost.

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**Ongoing service fees**

Our ongoing advice fees vary depending on scope and complexity and range from \$1,950 to \$11,500 (incl. GST) unless otherwise agreed. The exact cost of the ongoing review service will depend on the review offering we recommend and this will be disclosed within the Ongoing Service Agreement we provide to you.

We will recommend an appropriate review package in light of your circumstances.

Should you require any additional services outside of any agreement between you and your adviser, an amount of up to \$330 per hour, may be applied.

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**Non-advised transaction fees**

If we assist you on an execution only basis (i.e. where you have been offered and declined advice), a fee of up to \$330 per hour will be applicable.

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**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.