

## Adviser Profile

### William James Mills

Authorised Representatives: 268734



## Price Financial Intelligence Pty Ltd

Australian Financial Services Licence: 402367

### My Authorisations

<p>I have been approved by the licensee to act under the following authorization:</p> <ul style="list-style-type: none"><li>• Provide financial advice</li><li>• Arrange for a person to deal in financial product</li><li>• Apply for, acquire, vary or dispose of a financial product on behalf of another</li></ul>	<p>In respect of the following classes of product:</p> <ul style="list-style-type: none"><li>• Deposit and payment products</li><li>• Life insurance risk products</li><li>• Life insurance investment products</li><li>• Superannuation products</li><li>• Retirement saving accounts</li><li>• Government debentures, stocks or bonds</li><li>• Interests in managed investment schemes</li><li>• Investor Directed Portfolio Services</li><li>• Securities</li><li>• Managed Discretionary Accounts</li><li>• Standard Margin Lending Facility</li></ul>
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### My Remuneration and Charges

The Licensee passes on to my employer 50% of the fees and commissions which are a result of my recommendations. A fee or commission may be charged for the services I provide or a combination of the two may apply. The level of fees and commission will vary with the service provided and may be subject to negotiation but the following can be taken as a guide.

### Commission (including GST)

Investment & Superannuation	<p><u>Fee based:</u> Initial fee: 1.1% of the amount invested Ongoing adviser service fee: up to 2.2% pa of the account balance</p> <p><u>Commission based:</u> Initial commission: up to 4.4% of the amount invested Trailing commission: up to 1.1% pa of the balance in the amount</p>
Life Insurance	<p>Initial fee: between 15%-130% Ongoing adviser fee: 33% of premium in subsequent years</p>

When applicable, the fee can be an agreed amount for a particular service or a time based fee of up to \$450 per hour.

### Our Benefits

Our affiliated company Price Finance Consultants Pty Ltd has and may continue to receive Options to acquire shares in IOOF Holdings Ltd (IOOF) [www.ioof.com.au](http://www.ioof.com.au). IOOF is the product provider associated with our primary Wrap platform, and works closely with us regarding Australian Financial Services License (AFSL) compliance. IOOF owns DKN which also owns Lonsdale Financial Group which we have an association with for continuous training and professional development.

### My Contact Details

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