

Service Provider Remuneration Sharing Arrangements

May 2024

No.	Service Provider	Service Offering	Initial Revenue +GST (Average Fees)	Ongoing Revenue +GST (Average Fees)	Fiduciary Share (%)	Partner Share of Fiduciary Share (%)
moneyGPS Providers						
1.	Fiduciary AFSL – t/a moneyGPS	Digital Advice Services	\$50 – \$180	N/A	50%	50%
		Reports: moneyGPS, RCU, Lending	\$25 – \$50	N/A	50%	50%
2.	Sparks Financial Group	Comprehensive Advice	15% of initial financial plan. Average \$2.5k-3.5k	N/A	100%	80%
3.	Crown Money	Lending & Finance	0.6% (Residential loan)	Nil	20% – 33%	80%
4.	MyRewards	Rewards program – retail services	N/A	N/A	N/A	N/A
5.	Openinvest Platform	Investment Platform – ‘Fiduciary white-label’	N/A	0.20% p/a on FUA\$. Client discretion	100%	80%
6.	Blossum	Fixed Income Investments	0.25% of client account balance	N/A	100%	80%
7.	Aged Care Steps	Aged Care Financial Advice	\$1.1k – \$3k	N/A	15%	80%
8.	Household Capital	Home Equity Release	0.3% of loan value	N/A	100%	80%
9.	LawOnline	Online Wills	\$50.00 per will	N/A	100%	80%
10.	Australian Executor Trustees	Comprehensive Estate Planning	N/A	N/A	N/A	N/A
11.	Lifebroker	Online Personal Insurance	Up to 45% of premium	N/A	100%	80%
12.	Findex	Comprehensive Insurance Advice	15%-25% of all fees /commissions	15%-25% of all fees/commissions	N/A	80%
13.	Bricklet	Direct Property ‘Fragments’	0%-4% of invested amount	N/A	100%	80%
14.	Property Lab	Direct Property – national coverage	\$5k (Average fee)	N/A	100%	80%
15.	Bill Hero	Utilities Review	Eligible 30% of fee rebated to client	N/A	0%	0%
16.	Mercer CaLM	Aged Care Concierge	\$25.00 per user	N/A	100%	80%
17.	Touchstone	Advanced Care Plans	\$30.00 per user	N/A	100%	80%

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accountantsGPS Providers						
1.	Smarter SMSF	SMSF Documentation	N/A	N/A	N/A	N/A
2.	AIG Insurance	Group Insurance – No Underwriting	30% of net premium annually	30% of net premium annually	100%	80%
3.	Property Lab	Direct Property	\$5k (Average fee)	N/A	100%	80%
4.	Bricklet	Direct Property 'Fragments'	0%-4% of invested amount	N/A	100%	80%
5.	Oxygen SMSF Loans	LRBA Refinancing	15% of initial commission. Approx. \$300 average	N/A	100%	80%
6.	Australian Executor Trustees (AET)	Bespoke Estate Planning	N/A	N/A	N/A	N/A
7.	Blossum Investing	Fixed Income Investing	0.25% of client account balance	N/A	N/A	N/A
8.	IAFP	Education	N/A	N/A	N/A	N/A
9.	SMSF Advice	Q4 2024				
10.	Spark Financial Group	Comprehensive Advice	15.0% of initial financial plan. Average \$2.5k-\$3.5k	N/A	100%	80%
11.	Wealth Platforms	Q3 2024				