



Financial Services Guide – Part 2

Version number 25.0, 1 November 2025

This FSG Part 2 contains information specific to your Adviser and their firm and should be read together with the FSG Part 1, Version Number 25.0, which contains information about the AFS licensee and their general obligations and arrangements. Count Financial Limited (Count'), has authorised your adviser to distribute this FSG.

The financial services provider

Your Advisers are authorised to provide financial services as an authorised representative of Count AFS licence no. 227232, ABN 19 001 974 625, authorised to provide the financial services described in this FSG through Peters Professional Planning Pty Ltd, ABN 60 096 670 754, ACN 096 670 754, ASIC ID number 000283002 trading as Affinitas Financial Planning.

Our contact details

Peters Professional Planning Pty Ltd Trading as Affinitas Financial Planning

Phone: 1300 990 222

Website: www.affinitasfinancialplanning.com.au

Email: service@affinitasfp.com.au

Office Address: Suite 11, 1000 Waterworks Road, The Gap, QLD 4061

Postal Address: PO Box 16, The Gap QLD 4061

Our Privacy Collection Statement

We collect personal information about you (and, if applicable, anyone acting on your behalf) to help us provide financial services that are suited to your needs, to manage our relationship with you, and to meet our legal obligations under the Privacy Act 1988 and the Corporations Act 2001.

This statement forms part of our broader Privacy Policy, and together they make up our formal notice under Australian Privacy Principle 5.

Why we collect your information

We need certain information to understand your financial situation and provide appropriate advice or services. The specific information we collect will depend on who you are and the nature of the services you need.

If you choose not to share some details, or if the information is incomplete or inaccurate, it may limit our ability to provide advice or services to you, or we may not be able to proceed at all. It could also mean that the advice you receive is less tailored to your situation. In some cases, we may need to end our relationship if we cannot properly meet your needs.

Who we may share your information with

To deliver our services, we may need to share your information with:

- Product and platform providers
- External service providers (e.g. paraplanners, IT providers)
- Other professionals you've authorised us to work with (e.g. your accountant or tax adviser)

Sharing information overseas

Some service providers we use may be located overseas or have operations outside Australia. Your personal information might be stored or accessed in these countries. We take reasonable steps to make sure your information is protected and handled in line with the Australian Privacy Act.

For more information about which countries your information may be sent to, please refer to Count's [Privacy Policy](#) or contact us directly. If you do not wish for your information to be transferred overseas, please let us know.

Accessing or correcting your information

If you think any of the details that we hold are incorrect or out of date, please contact us to correct this. You can ask to access or correct your personal information at any time by contacting us.

A copy of our Privacy Policy is on Count's website www.count.au. We can also send you a copy if you contact us.

Fees

These fees should be considered a guide only. We will discuss your individual needs and agree our fees with you before we provide advice. The actual agreed fees will depend on the complexity of your circumstances, goals and needs and the scope of advice we provide. Please note that fees may be higher than those outlined here if mutually agreed upon. The indicative fees we charge are set out below:

Advice Preparation and Implementation fees:	The fee for the preparation and implementation of our advice is calculated based upon a fixed price agreement. This amount will vary based upon the complexity of advice being provided and is as follows: ○ Our minimum fee is \$4,400.00 ○ Our maximum fee is \$20,000.00 Where it is determined that your service is for insurance only advice, the fee for the preparation and implementation of our advice is as follows: ○ Our minimum fee is \$1,100.00 for an individual ○ Our minimum fee is \$1,650.00 for a couple ○ Our minimum fee is \$2,200.00 for complex cases
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 \$330.00 per hour.
Ongoing Service Fees:	These are the fees you pay when you agree to receive our ongoing advice package. Our services will be agreed with you in a Client Service Arrangement. ○ Our minimum fee is \$2,200 per annum. ○ Our maximum fee is 1.00% of the funds under advice.
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 \$330.00 per hour will be applicable.

Note: All fees are inclusive of GST.

Referral arrangements

Peters Professional Planning Pty Ltd may have referral arrangements with other professional service providers. If a client is referred to us, we may pay the referrer a fee or other benefit. We will record the details of any referral fees in the Statement of Advice we prepare for you. We will only refer you to third party professionals, where we believe it is in your best interests to do so. All fees and commissions are paid by Peters Professional Planning Pty Ltd.

Referral partner	Description of referrer	Payment structure
MHP Partners	Accounting and taxation services	Up to 20% of upfront adviser service fees will be paid to MHP Partners where they have referred you to us. For example, if your initial fee is \$4,400, MHP would receive \$880 (incl GST) referral fee.

Please refer to FSG Part 1, for further information on other relationships that might influence Count in providing financial advice services, we will also disclose any associations or conflicts in the Statement of Advice that we prepare for you.

ADVISER PROFILE

About Bradley Peters

The Authorised Representative number for Bradley Peters is 001006518 and his details are available on the [Financial Advisers Register](#).

What experience does the adviser have?

Brad has 38 years of experience in the provision of financial / accounting advice and more than 25 years' experience in the provision of financial planning advice.

What qualifications has the adviser completed?

Brad attained a Bachelor of Arts Degree from University of Queensland on 20 December 1988 and a Masters of Business Administration from University of Queensland on 19 December 1994. He is a registered tax agent, Fellow of CPA Australia and holds a Financial Planning Specialist designation from CPA Australia (awarded 21 December 2000).

What products and services can the adviser provide?

Bradley Peters is authorised to provide the following products and services:

- Basic deposit products
- Life insurance
- Government debentures, stocks and bonds
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Superannuation
- Standard margin lending

What other associations and relationships does the adviser have?

Brad Peters is a member of CPA Australia.

Brad Peters is a director and shareholder of Peters Professional Planning Pty Ltd ABN 60 096 670 754, trading as Affinitas Financial Planning, is an Authorized Representative of Count Financial Limited ABN 19 001 974 625 Australian Services Licence Holder Number 227232 (Count Financial).

How will your financial adviser be paid for the services provided?

All fees and commissions disclosed in the FSG which are attributed to the services provided to you by your adviser are paid to Count who will pay up to 100% of those fees and commissions to Peters Professional Planning Pty Ltd.

Bradley Peters is a director and shareholder of Peters Professional Planning Pty Ltd and is remunerated through the payment of salary and dividends.

ADVISER PROFILE

About Thirza Stacey

The Authorised Representative number for Thirza Stacey is 001004236 and her details are available on the [Financial Advisers Register](#).

What experience does the adviser have?

Thirza has more than 20 years of experience in the provision of financial planning advice and has also held roles with bank institutions and health insurers.

What qualifications has the adviser completed?

Thirza holds an Advanced Diploma in Financial Planning as well as Self-Managed Superannuation Funds and Margin Lending accreditations.

What products and services can the adviser provide?

Thirza Stacey is authorised to provide the following products and services:

- Basic deposit products
- Life insurance
- Government debentures, stocks and bonds
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Superannuation
- Standard margin lending

What other associations and relationships does the adviser have?

Thirza Stacey is a member of the Financial Advice Association of Australia (FAAA).

Thirza Stacey is a director and shareholder of TRACC Investments Pty Ltd, which is the trustee for TRACC Family Trust, which are shareholders of Peters Professional Planning Pty Ltd, which are separate entities.

How will your financial adviser be paid for the services provided?

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Thirza Stacey is an employee and shareholder of Peters Professional Planning Pty Ltd and receives a salary, plus dividends payable if company profits permit.
