Nexus Life Pty Ltd
Financial Services Guide

ABN 54 143 842 611 | Authorised Representative No: 365616 **Version number: 24.01**

PART TWO – ADVISER PROFILE

This adviser profile is Part Two of the Count Financial Limited (Count) Financial Services Guide (FSG) 26 February 2024 and should be read in conjunction with Part One of our FSG dated 1 January 2024. Together these documents form the complete FSG.

Nexus Life Pty Ltd trading as Nexus Life is an Authorised Representative of Count Financial Limited (Count).

The individual(s) listed in this FSG is authorised by Count to provide personal advice through Nexus Life Pty Ltd

Our contact details:

Unit 6 134 Main Street, Osborne Park , WA 6017
Phone 08 9278 5444
Email: David.lakey@nexuslife.com.au

David Lakey

Authorised Representative Number: 237240

David Lakey is an Authorised Representative of Count and a director, employee and shareholder of Nexus Life Pty Ltd (Rep No. 365616) which pay a salary from the commissions and fees received. David may also be entitled to receive dividends

David has 30 years of experience in the provision of financial planning advice. David attained a Diploma of Financial Planning from the Financial Planning Association on 09 September 1997.

David is an Advice Practitioner of the Financial Advice Association of Australia Limited David is accredited to advise in Self Managed Superannuation Fund

David Lakey is authorised to provide advice in the following areas:

Financial services and product

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

How to contact me: David.lakey@nexuslife.com.au or 04090842477

Ongoing & Fixed Term service fees

Our ongoing and fixed term advice fees vary depending on scope and complexity and range from $0 to $7,000 (incl. GST) unless otherwise agreed. The exact cost of the ongoing/fixed term review service will depend on the review offering we recommend and this will be disclosed within the Ongoing or Fixed Term Service Agreement we provide to you.

Non-advised transaction fees

If we assist you on an execution only basis (ie where you have been offered and declined advice), a fee of up to $3,500 will be applicable.

Referral arrangements

We have a referral arrangement in place with the providers detailed below. If you use the services of these providers we will receive the corresponding fee disclosed in the below table for the referral of your business. This will be paid for by the relevant provider and is not an additional cost to you. Where fees are paid to our referrers no benefit is passed on to your Adviser.

We have referral arrangements in place with

Westcover Insurance Solutions Pty Ltd,

Pelican Risk Services Pty Ltd, and

Chaharlia Pty Ltd whereby we pay the 22% of the initial

commissions we receive in relation to the advice provided to you

I may refer you to a third party for advice or services. Should this occur, you are not obliged to consult the professional person I have suggested. If you wish to consult a non-referral partner, I can provide additional options.

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.

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