

Supplementary Financial Services Guide

Alteris Lifestyle Care

Alteris Lifestyle Care Sydney Pty Ltd and Alteris Lifestyle Care Brisbane Pty Ltd are authorised representatives of
Alteris Financial Group Pty Ltd ABN 59 133 479 115 AFSL No 402370
Dated: 1 May 2025

This Supplementary Financial Services Guide (SFSG) supplements the Alteris Lifestyle Care Financial Services Guide (FSG) dated 1 May 2025. This SFSG is to be read in conjunction with the FSG. All fees are inclusive of GST.

Initial Consultation Fee **\$1,890 – \$4,130**

Our initial consultation fee is applicable for providing information on aged care fees and charges and assessing how they may impact you. By attending the initial consultation, you agree to pay this fee.

The amount payable is determined based on the time required to gather information, the types and number of aged care facilities under consideration, the assets to be included, and the complexity of work involved in preparing the discussion paper. The report will provide a summary of:

- Your assets and liabilities
- Fees and charges associated with moving into aged care
- Cashflow and capital projections for up to three different strategies

Further details regarding any additional fees will be provided to you before any work is undertaken.

Recalculation Fee **\$990 – \$1,890**

In cases where changes in your circumstances necessitate revisions to the initial discussion paper and the preparation of new options, a recalculation fee may be incurred.

Statement of Advice Fee **\$4,000 – \$6,000**

A Statement of Advice fee is payable where we provide you with personal financial product advice. This fee relates to the preparation and implementation of the personal financial advice being provided.

Service Offer and Implementation Fee

\$3,450 – \$12,990

The fee will be determined based on the estimated duration, complexity, and ongoing work needed for implementing your selected strategy and ensuring the accuracy of aged care fees and government pension outcomes, if relevant. The service and implementation period will range from a minimum of 6 months to a maximum of 2 years. After the specified time, a new service agreement will be required.

In the event the service is terminated after commencement due to changing circumstances, we will provide an adjusted fee based on the work completed up until that point. The revised fee will fall within the range of \$1,000 and the initially quoted fee.

Lifetime Service Offer

\$180 – \$360 per month

This service is offered to assist you in ensuring the accuracy of Centrelink/DVA benefits and aged care fees. The fee is determined by whether one or both members of a couple are in aged care, as well as whether they are situated in the same or separate aged care facilities. As part of this service, we collaborate with you to gather the required information and interact with authorised third parties.

Please note that either party may discontinue this service by giving one month's written notice.

Means Tested Care Fee

\$1,790 Plus \$195 per month

This service is offered to assist you in the management of the care fees for aged care residents, taking into account the annual and lifetime fee caps. As part of this service, we will collaborate with you to gather the required information and liaise with authorised third parties.

Please note that either party may discontinue this service by giving one month's written notice.