

My Age Pension

Contact:	Jacqueline Parker
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Phone:	0419787847
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BFP Member Benefit & Special Pricing Arrangement

Business Name

MY AGE PENSION

Website www.myagepension.com.au

Synopsis of Business

I specialise in assisting individuals with understanding, accessing, maximising, and maintaining the Age Pension. My business helps individuals to navigate the complexities of the Age Pension System, ensuring they access their full entitlements. Whether it's explaining eligibility criteria, making the application on their behalf, providing ongoing support, calculating how a change might impact, monitoring thresholds or dealing with issues that arise.

This service is also available to the clients of Financial Advisers. The service can be provided directly to the client as an independent business to the Adviser or it can be offered to the client as a contracted service to the Adviser.

In addition, I offer consultations to Advisers to help them understand how their advice and recommendations might impact their clients' eligibility for Age Pension benefits.

By enhancing their knowledge in this area, I help Advisors to provide more comprehensive and tailored advice, ensuring their clients' financial plans align with their clients Age Pension goals. Through our collaborative efforts, Advisors can ensure that they maximise their clients Age Pension benefits.

Product/Service Description

My Age Pension offers the following Client Services.

- Initial Consultation
- Pension Application Package
- Client Support Package
- Age Pension Advocacy
- Age Pension Advice

Details of what each of these services entails can be found at <https://www.myagepension.com.au/client-services>

My Age Pension offers the following Adviser Services

- Client Presentations
- Consultations
- Cheat Sheets and Articles

Details of what each of these services entails can be found at <https://www.myagepension.com.au/adviser-services>

BFP Pricing Arrangement

Client Pricing

When a client is referred by the Adviser, the requirement to have an initial consultation will be removed. That is a cost saving of \$120 per client.

Adviser Pricing

When an Adviser requests a Client Presentation or a Consultation, the hourly rate will be reduced to \$80 per hour. This is a cost saving of \$40 per hour.

This Offer will remain in force until amended, updated or withdrawn by us

Process to Access Offer

Before making a referral, contact My Age Pension to discuss agreed lines of communication between your office, the client, and My Age Pension.

When making a referral, provide My Age Pension with a synopsis of the client and their financial situation.

Note that to provide services to your client My Age Pension will need to become the client's Correspondence Nominee. My Age Pension will make these arrangements with the client. Current Nominees are unable to nominate other Nominees.

Business Representative Details

Name: Jacqueline Parker

Email: jacqueline@myagepension.com.au

Phone: 0419787847

Date: 20 October 2023



FILE NOTE

This Page for BFP Executive Use

This File Note is designed to enable collection and retention of all relevant information relating to a Member Benefit & Discount offer provided by an external third party.

Date of Offer

Agreed Review Date

Author of Offer Document (if different from Contact name)

Email:

Phone:

BFP Contacts – Originator Name

Tony Gillett

Email: tony@retirewell.com.au

Phone: Mob) 0417 343 343

BFP Contact Name

(Same as above)

Comments