

2 December 2022

Jason Test  
1 Adelaide Street  
Adelaide SA 5000

## Fixed Term Contract

Dear Jason and Mary,

Please find enclosed your Fixed Term Contract detailing our service arrangements for you and your related entities:

- Jason
- Mary

This **Fixed Term Contract** covers:

- your *proposed service period* 1 December 2022 to 30 November 2023. It details the services you are entitled to receive and the fees that will be deducted for the provision of these services.

In addition, the **Consent to deduct fees** form(s) authorise the agreed service fees to be deducted from your designated product(s) for the proposed service period.

### 👉 Your action required

- **Fixed Term Contract** - Review. If happy to proceed, sign and date where indicated and return to us before **1 December 2022**.
- **Consent to deduct fees form(s)** - Review, sign and date where indicated. Return to our office before **1 December 2022** so we can lodge with the product provider(s) on your behalf.


We look forward to working with you to help you achieve your financial goals and objectives.

Should you have any questions, please feel free to contact me on 08 1234 5678 or by email [support@opexconsulting.com.au](mailto:support@opexconsulting.com.au).

Yours sincerely,

### Your Adviser

Financial Adviser  
Opex Consulting is a Corporate Authorised Representative of  
ABC Licensee | **ABN** 12 345 678 789 | **AFSL** 123456

 Advise if you require an FDS within your Fixed Agreement

## Fixed Term Contract

### Your contract

Statement details	
Client(s)	Jason Test and Mary Test
Address	1 Adelaide Street Adelaide SA 5000
Statement	Fixed Term Contract
Service period	1 December 2022 to 30 November 2023
Date of issue	15 November 2022

### Your Services

The services you will be entitled to receive for the upcoming service period will be as follows:

Services we agree to provide	Description
<b>Jason and Marty</b>	
Half yearly Review Meeting	Half yearly review of your circumstances and review how you are tracking
Newsletter	You will receive regular newsletters providing information articles including lifestyle, economic, travel, etc.
Online Access	You will have unlimited access to our online portal providing up to date information around investments as well as important documents
Quarterly Review Report	We will chat with you quarterly to review you circumstances and discuss any changes that are required.

### Your fees

The fees payable for the abovementioned services for the upcoming service period are as follows:

Fee	Source	Owner(s)	Frequency	Amount	Total Fee p.a. (inc GST).
Adviser Service Fee	AET Netwealth Investment Accelerator (12415421)	Jason and Mary	Monthly	\$52.00	\$624.00
<b>Total fee for service period</b>					<b>\$624.00</b>

The total fee payable for the proposed Service Period is \$624.00 (including GST).

The terms and conditions as provided by your licensee for the Fixed Term Service Agreement goes here.

## Terms and conditions

T&C's detail text.

## Your acceptance

Please mark the box which indicates the action you wish to take, and then confirm your acceptance by signing below.

**We understand wish to proceed with this Fixed Term Contract**  
By agreeing to proceed with the Fixed Term Service Agreement with Opex Consulting Pty Ltd We understand that We will have access to the services and be charged a fee for these services as outlined in this Fixed Term Contract for the period 1 December 2022 to 30 November 2023.

**We understand do not wish to proceed with this Fixed Term Contract**  
We understand that by choosing not to proceed with the Fixed Term Contract, We will not be provided with service(s) detailed in this agreement and the associated fee for the provision of these service(s) will not be charged by Your Financial Services & Pty Ltd. We acknowledge that We will be responsible for our own investments and insurances and keeping up to date with changes to legislation that may occur in the future.

If you do not acknowledge this notice by **1 December 2022**, you will be taken to have elected to decline this agreement.

Accepted on behalf of **Client(s)**:

Signatory		
<i>x</i>		/ /
	Jason Test	Date

Signatory		
<i>x</i>		/ /
	Mary Test	Date