Website Disclosure Information

L Jack & Associates Strategic Advisory Pty Ltd

Date: 7 August 2025

L Jack & Associates Strategic Advisory Pty Ltd ABN 91 611 699 220 is an Australian Financial Services Licensee (AFSL No.486680) (**Licensee**).

Address [1]	Suite 11, 15 Terminus Street, Castle Hill, NSW 2154
Phone	02 9659 8174
Email	leonie@ljackassociates.com.au

L Jack & Associates Strategic Advisory Pty Ltd and its advisers (**we** or **us**) are authorised to provide the financial services outlined in this WEBSITE DISCLOSURE INFORMATION.

We appoint Authorised Representatives to act on our behalf for the provision of Financial Services.

This Website Disclosure Information (WEBSITE DISCLOSURE INFORMATION) is provided by:

- Leonie Jack (Authorised Representative No. 001253477)

The distribution of this WEBSITE DISCLOSURE INFORMATION is authorised by the Licensee.

[1] s 942C 2)(c).

Purpose of WEBSITE DISCLOSURE INFORMATION

The purpose of this WEBSITE DISCLOSURE INFORMATION is to inform you of our services and fees, and assist you when deciding whether to use those services.

This WEBSITE DISCLOSURE INFORMATION includes information about:

- the financial services and products we provide;
- the advice and documents you may receive;
- your privacy and how we collect your personal information;
- what to do if you have a complaint;
- the significant relationships and associations we have;
- the remuneration and other benefits that may be received by us or other relevant persons in connection to the financial services we provide to you; and
- fees and charges for our services.

Financial services we provide

The Licensee authorises us to provide financial services including financial product advice (general and personal advice) and deal in financial products including:

- basic deposit products;
- simple managed investment schemes, excluding Investor Directed Portfolio Services (IDPS);
- securities;
- superannuation, including self-managed superannuation funds;
- general insurance products;
- life risk insurance products, including term life, total and permanent disability, trauma and income protection.

In addition, we provide a suite of professional services to assist with estate planning, wills, family trusts and companies. We also have relationships with a number of professionals, including lawyers, and mortgage brokers who we can work with to help you achieve your goals.

Documents you may receive

In addition to this WEBSITE DISCLOSURE INFORMATION, you will receive other important documents. Please refer to the following definitions for a description of the documents you are likely to receive:

Statement of Advice (SOA)

If we give personal financial advice to you, we will provide you with a SOA. We must give the SOA to you the first time we provide you with personal advice about financial products or where there has been a significant change in your circumstances.

We provide personal advice when we take your personal circumstances into account when providing the advice. Personal advice can be given on your complete financial situation or on limited areas you require advice on – we will discuss the scope of the advice before we start work.

We must give you the SOA before we provide any services to implement our recommendations. We have legal and ethical obligations to ensure that the advice and recommendations we provide to you are in your best interests.

The SOA will include the following information:

- our advice and the grounds for our recommendations;
- information about fees and commissions that may be received for the advice; and
- any associations, relationships or interests that may influence the advice we provide.

Where the personal financial product advice relates to a basic deposit product, an SOA will not be provided.

Advice (ROA)

We may also record our advice through preparing a record of advice in some circumstances instead of providing you with another SOA. If you have not been provided with a copy of the ROA, you may request a copy of it free of charge at any time within seven years after the advice was provided to you, by contacting us.

Client Service Agreement

The Client Service Agreement will be tailored to your specific requirements and outlines the benefits, services and support we will provide you. It will contain terms and conditions for our fees and costs for providing and implementing our advice.

How can you provide us with instructions?

You can give us instructions in writing, by phone, email or any other means that we agree with you from time to time.

Who do we act for?

As an AFSL holder, we act on our own behalf when providing you with financial services.

Fees and charges

We will charge you a fee for personal advice and dealing services we provide to you.

All fees are **inclusive** of GST.

One-off fees

We may charge a one-off fee for providing and implementing a discrete piece of advice, or processing a transaction for you. That fee will either be:

- a fixed fee; or
- an hourly rate.

Our fixed fee for personal advice is generally in the range of $1,980 to $3,300, depending on the amount of work required. We will provide an explanation of how we calculate the fee before we provide advice to you.

Our fixed fee for processing a transaction (i.e. no advice) for you is $330.

Our hourly rate is $330], and the total fee payable for our work will be based on the number of hours work done. We will provide an estimate of the number of hours and the total fee payable before we provide advice to you.

Fee disclosure

Details of these fees and benefits will be provided to you in an engagement letter or services agreement before we provide advice, and will be included in the SOA or ROA provided to you.

Please contact us if you require any further information about how we or our advisers are remunerated.

Remuneration, commissions and other benefits

Commissions

We do not receive commissions.

How our advisers are paid

Our advisers are paid a salary which does not change depending on the amount of financial services they have provided.

Associations

We are required to disclose any associations or relationships between us, our related entities and product issuers that could reasonably be capable of influencing the financial services we provide to you.

We are associated with an accountancy firm, L Jack & Associates, who we may refer clients to from time to time when those clients require accounting services. Our practice principals are also principals of L Jack & Associates. They might receive an indirect benefit if we refer you to L Jack & Associates, because they share in the profit made by L Jack & Associates. L Jack & Associates does not pay referral fees to us. We will only refer you to L Jack & Associates if we think the referral is in your best interests.]

Complaints

We are fully committed to providing quality financial services.

If you have a complaint about the services we provide to you, please follow the steps outlined below. Our dispute resolution system is free of charge. We are a member of the Australian Financial Complaints Authority (AFCA) complaints resolution scheme.

Step 1

Contact the Complaint Officer and provide the details of your complaint. Our contact details are:

L Jack & Associates Strategic Advisory Pty Ltd

Phone: 02 9659 8174

Mail: PO Box 568 CASTLE HILL NSW 1765

We will endeavour to acknowledge receipt of your complaint within one business day (or as soon as practicable).

We will endeavour to resolve your complaint quickly and fairly, within 30 days of receipt of your initial complaint. In some circumstances, for example where the complaint involves particularly complex issues, it may take longer than 30 days to resolve a complaint. If we determine that it will take us longer than 30 days to resolve a complaint we will write to you to explaining the delay.

We will provide a written response informing you of the final outcome of your complaint and your rights to escalate the complaint if you are not satisfied with our final decision.

Step 2

If you are not satisfied with our final response to your complaint, or we have not resolved your complaint within 30 days, you may lodge your complaint with AFCA (provided that the complaint is within AFCA's terms of reference). AFCA is an independent complaints resolution body which is available to you free of charge.

Please note that AFCA will not initiate its process until we have had prior opportunity to respond to your complaint.

Online	www.afca.org.au
Email	info@afca.org.au
Phone	1800 931 678
Fax	(03) 9613 6399
Mail	Australian Financial Complaints Authority GPO Box 3 Melbourne VIC 3001

Compensation arrangements

We hold professional indemnity insurance in respect of our financial services which complies with the *Corporations Act 2001* (Cth). The professional indemnity insurance covers all of the financial services you are provided, even if they were provided by a person who is no longer our Authorised Representative.

Privacy

Australian Privacy Principles apply to how we collect and use personal information. The information you provide to us for the purposes of obtaining financial product advice must only be used to:

- fully understand your financial planning needs
- provide you with information, products or services that you might reasonably expect or request
- manage rights under any laws applying to the services provided; and
- conduct research and marketing which includes direct marketing (although you have the right to specifically instruct us not to use your personal information for these purposes).

For details of how we collect and use your personal information, please contact us.

Further Information

If you have any further queries about our financial services, please contact us.

Contact us

Name	L Jack & Associates Strategic Advisory Pty Ltd
Address	Suite 11, 15 Terminus Street, CASTLE HILL NSW 2154
Phone	02 9659 8174
Email	leonie@ljackassociates.com.au

Adviser profiles

This adviser profile forms part of the WEBSITE DISCLOSURE INFORMATION dated 7 August 2025.

About Leonie Jack

Leonie is a member of Chartered Accountants Australia and New Zealand. She has a strong interest in ensuring her clients have affordable and quality financial advice. Following the reform of the financial advisory field Leonie undertook further study to ensure she was able to continue to provide advice to clients. This is particularly in relation to retirement planning and investment, superannuation and SMSF's.

Qualifications

Bachelor of Economics

Chartered Accountant (CA)

Diploma of Financial Planning

Financial services Leonie Jack is authorised to provide

Leonie Jack is authorised to provide financial services including financial product advice (general and personal advice) and deal in financial products including:

- basic deposit products;
- simple managed investment schemes, excluding an Investor Directed Portfolio Service (IDPS);
- securities;
- superannuation;
- general risk insurance;
- life risk insurance products, including term life, total and permanent disability, trauma and income protection;

Contact Details

Suite 11, 15 Terminus Street, Castle Hill, NSW, 2154

Phone: 02 9659 8174

Email: leonie@ljackassociates.com.au