Life’s complicated. Get financial advice that’s simple.

Financial Planning Week 4 – 9 October

Thank you for joining us.
We will commence shortly

FINANCIAL PLANNING WEEK

TELSTRASUPER FINANCIAL PLANNING

TODAY'S TOPIC

Why meeting a financial adviser could be the best thing you do.

TelstraSuper

Meet the speakers

Kingsley Wright

Regional Manager - South

Telstra Super Financial Planning Pty Ltd
AFSL 218705

Anthea Kos

Member Education Consultant

TelstraSuper Pty Ltd
AFSL 236709

IMPORTANT NOTICE

This presentation contains factual information and general advice only. It has been prepared without taking into account your objectives, financial situation and needs. Before you act on any information or make any financial decision, you should consider whether it is appropriate having regard to your personal circumstances.

If you are considering acquiring a financial product you should obtain the relevant product disclosure statement (PDS) before making any decision. You may wish to consult an Advisor before you make any decisions relating to your financial affairs. To speak with an Advisor from TelstraSuper Financial Planning, call 1300 033 166.

The taxation information in the presentation is factual information only. If you require taxation advice you should consult your accountant or tax adviser.

1. WHY WE DO WHAT WE DO...
2. OUR ADVICE OFFER TO YOU
3. NEXT STEPS
4. QUESTIONS

WHY WE DO WHAT WE DO...

Our trusted team

- TelstraSuper Financial Planning has been providing advice to TelstraSuper members for 19 years. Since launching we've helped over 30,000 members get personalised help with their financial future.
- Financial advice not only can help you manage your wealth but also can make you feel more confident and in control before and after retirement. The right kind of financial advice can really make a big difference to your future.

Grew our Intra-Fund advice service

- 19,400 member engagements
- 3,844 Intra-Fund advice appointments
- 99% of members surveyed rated our Advisers as **very good** or **excellent**

Strong Comprehensive advice offer

- 3,500 total client meetings
- 2,100 ongoing service packages
- 2,400+ advice document issued

Maintaining our Commitment to Advice

- Retaining our Comprehensive and OGS offer
- Broadening advice to include more external options
- A new investment platform for our clients
- Investing in resources to support growth
- Key to maintain our 95% retention rate

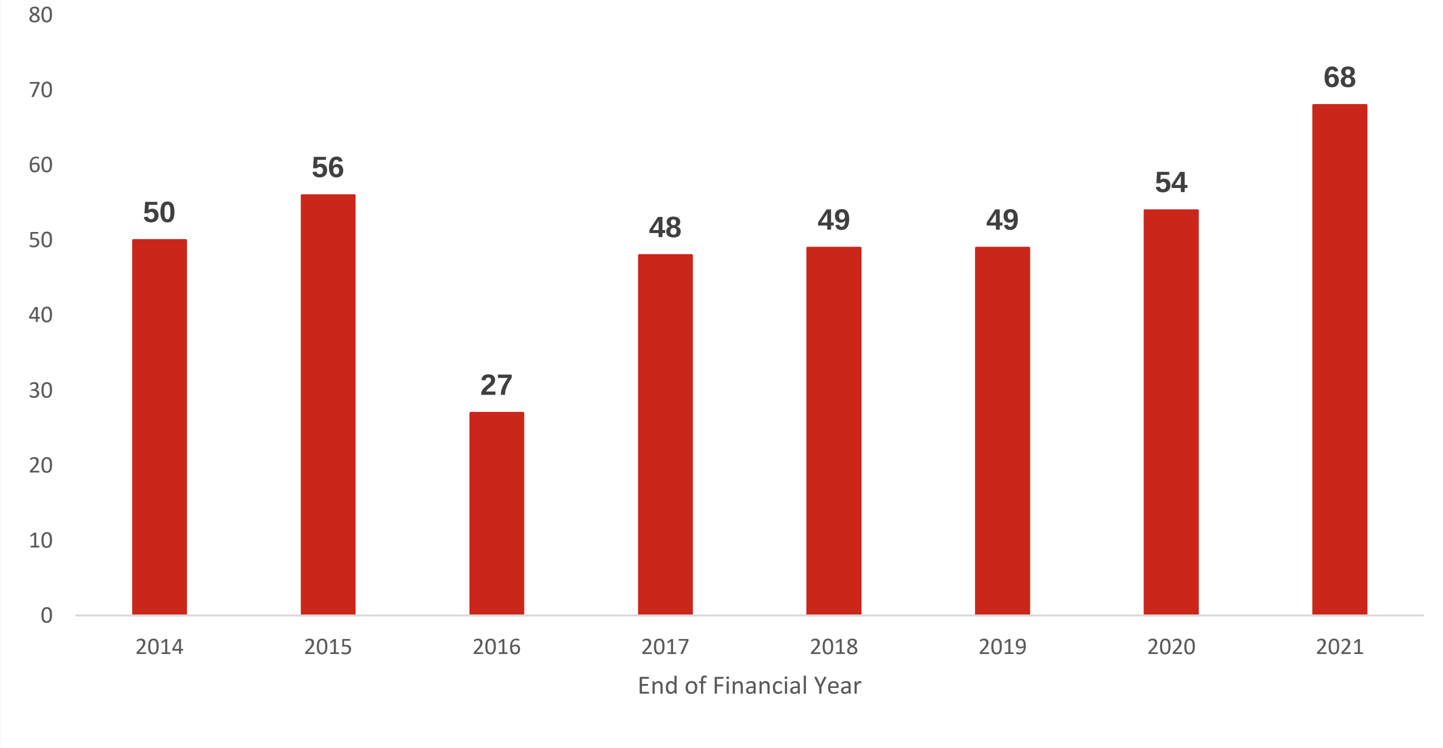
All TelstraSuper advisers have passed the FASEA exam

Source: information obtained from our Customer Relationship Management system and TelstraSuper Financial Planning client surveys. Information for the 2020/21 financial year

WHY WE DO WHAT WE DO….

The member experience speaks for itself

NPS among those who have had an interaction with a TSFP in the last 2 years



"Great support and understanding of my position and requirements. Excellent and professional advice and service."

"The willingness for Catherine to listen to my requirements and understand my situation for outstanding."

"Jamie actually listened to what I wanted out of Super and didn't try and force anything I didn't want on to me."

Source: Nature survey

OUR ADVICE OFFER TO YOU

OUR ADVICE OFFER TO YOU

Life’s complicated. Get financial advice that’s simple.

Our new updated Advice model and branding, to broaden the offer to all members

Simple phone advice and info to max your super.

Want to take that next step with your super or finances? We’ll find you a simple solution.

Let’s check out your whole financial situation and make a plan.

Ongoing expert coaching on super and wealth. We’ll nudge and encourage you, keeping you on track as life changes.

OUR ADVICE OFFER TO YOU

Life's complicated. Get financial advice that's simple.

TelstraSuper Financial Planning

A full suite of advice options at any stage of life

Super Sorter

Investment Choice, contributions and insurance within the Fund.

No additional cost to members

Step It Up

Simple retirement, complex contributions, tailored investment choice, TTR, and compare my super.

$450 - $1,000 per topic
(+GST where applicable)

NEW

Big Picture It

Retirement planning, wealth accumulation and comprehensive insurance.

Fee for Service
Range $1,800 - $2,750
(+GST where applicable)

Stay On Track

Ongoing advice service to keep our clients on track to meet their goals and objectives as their life, and financial situation, changes.

2 options
Super on Track $1,600
Life on Track $2,100
(+GST where applicable)

OUR ADVICE OFFER TO YOU

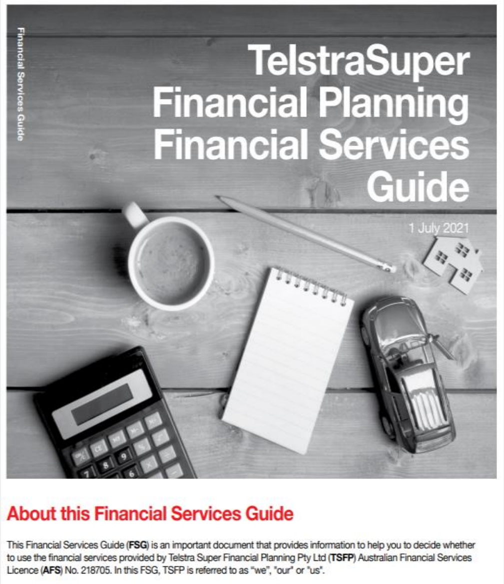
‘Big Picture it’ Comprehensive advice for a fee

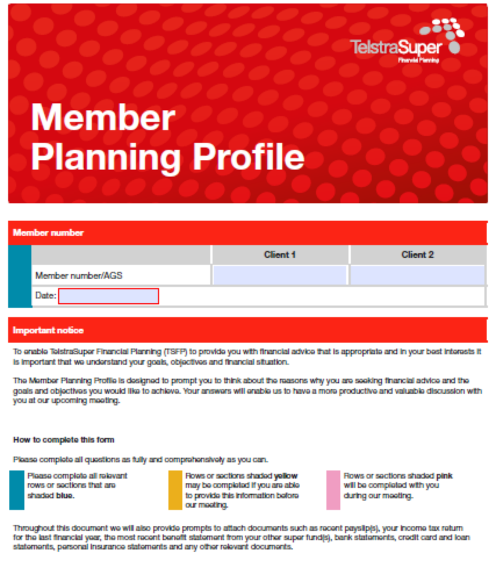
Identifying, discussing and prioritising your personal Financial and Lifestyle Goals and Objectives

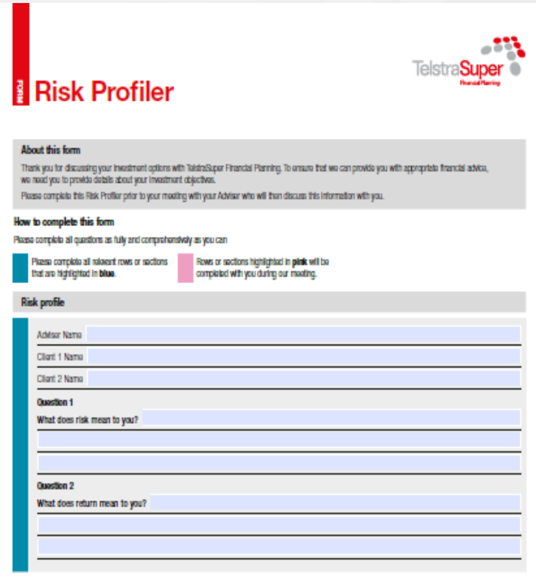
Comprehensive Personal Insurance	Structuring your investments inside of Super	Defined Benefit	Getting ready for Retirement	Complex Income Stream set up
Budget, cashflow & tax	Building wealth outside of Super	Transition to Retirement	Centrelink Entitlements	Estate Planning

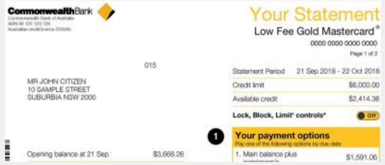
OUR ADVICE OFFER TO YOU

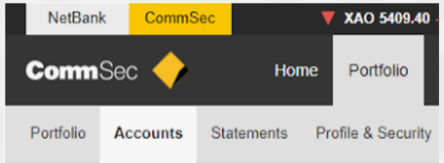
‘Big Picture it’ Meeting preparation











OUR ADVICE OFFER TO YOU

‘Big Picture it’ the initial meeting expectations

Initial discovery meeting - 90 minutes

	About your	Now	To do	Goals: 10 years
Your life	Family			
	Work			
	Lifestyle			
	Home			
Your finances	Investment Knowledge			
	Complete Financial Fact Find			

Client Name:

Adviser Name:

Date:

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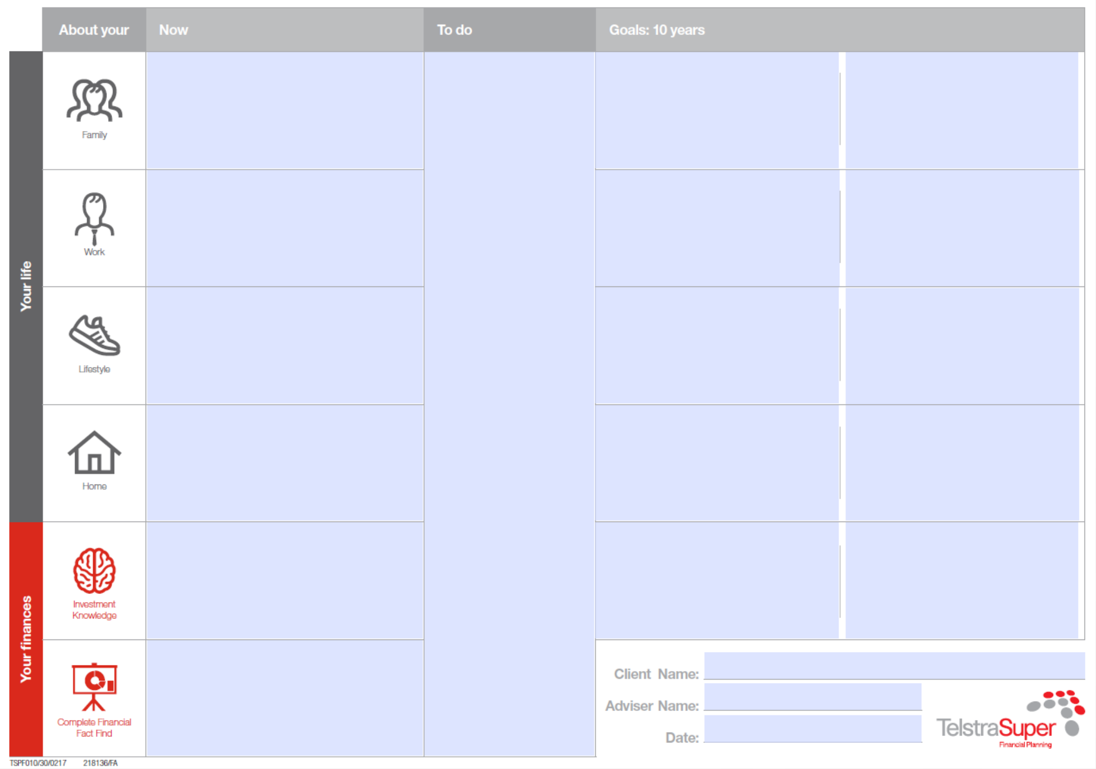
Have an open discussion about:

- Your expectations
- Where you are now
- What’s important to you in the future
- Identify, quantify & discuss your goals & objectives
- Highlight solutions to meet those…
- What concerns or worries do you have
- How we can help!

OUR ADVICE OFFER TO YOU

‘Big Picture it’ the initial meeting expectations

Initial discovery meeting - 90 minutes



Discuss the appropriate advice fee

Agree to proceed, or not!

Explain and discuss some of the key strategies

Discuss what happens from here…

OUR ADVICE OFFER TO YOU

'Big Picture it' the initial meeting expectations

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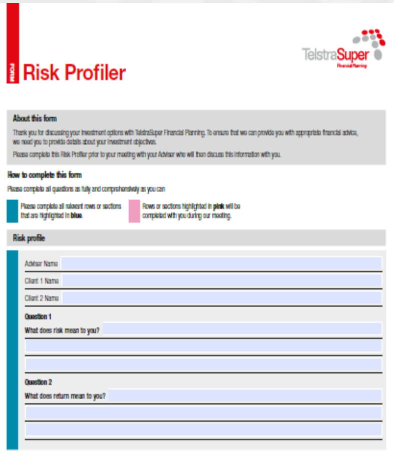

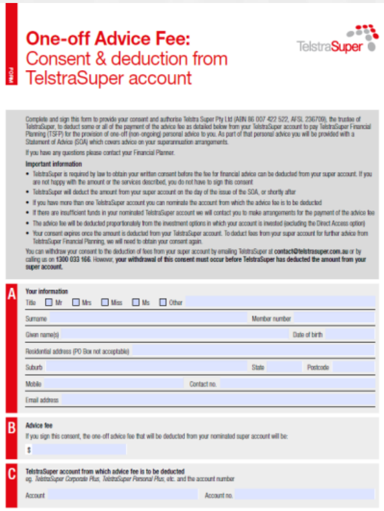

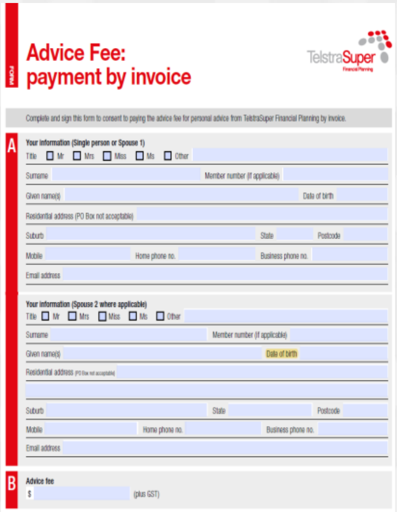

OUR ADVICE OFFER TO YOU

‘Big Picture it’ the next steps

Getting ready for Retirement

Defined Benefit

Complex Income Stream set up

Structuring your investments

Centrelink Entitlements

Transition to Retirement**

Budget, cashflow & tax

Building wealth outside of Super

Comprehensive Personal Insurance

Estate Planning

OUR ADVICE OFFER TO YOU

'Big Picture it' the next steps

- Getting ready for Retirement
- Defined Benefit
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- Structuring your investments
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- Transition to Retirement
- Budget, cashflow & tax
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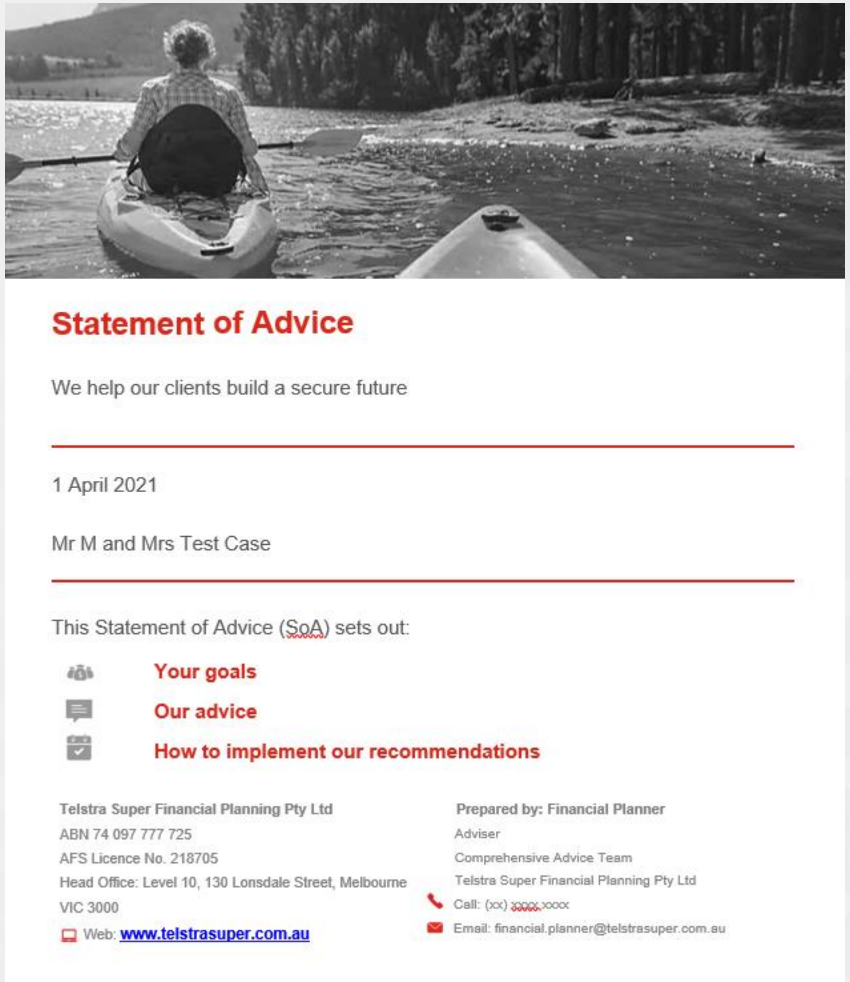
- Estate Planning



Statement of Advice

We help our clients build a secure future

1 April 2021

Mr M and Mrs Test Case

This Statement of Advice (SoA) sets out:

- Your goals
- Our advice
- How to implement our recommendations

Telstra Super Financial Planning Pty Ltd
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Adviser
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Telstra Super Financial Planning Pty Ltd
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OUR ADVICE OFFER TO YOU

‘Big Picture it’ the next steps

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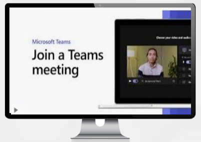
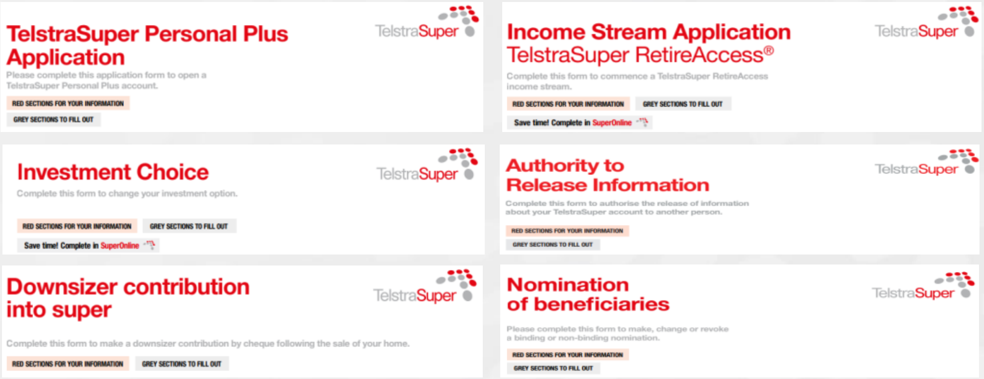
Plan Presentation meeting - 60 minutes





Advice Implementation & Confirmation

OUR ADVICE OFFER TO YOU

Stay on Track Ongoing Advice

Proactive management and review of your advice strategy, keeping you on track to achieve your long-term goals and objectives

TelstraSuper Super on Track

$1,600pa (+GST where applicable)

Receive advice specific to your TelstraSuper account

TelstraSuper Life on Track

$2,100pa (+GST where applicable)

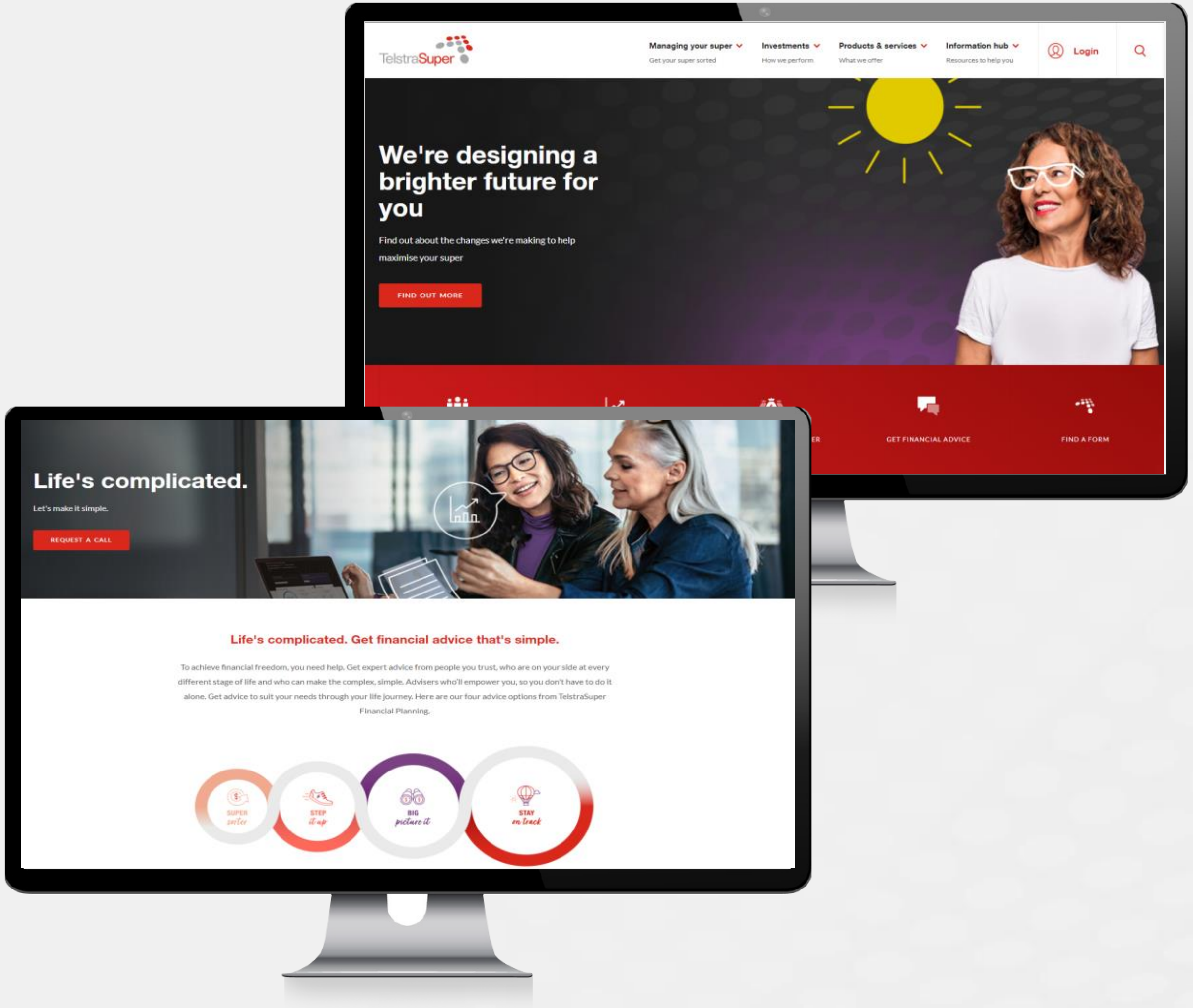
Receive advice specific to your TelstraSuper account, external super and/or investments

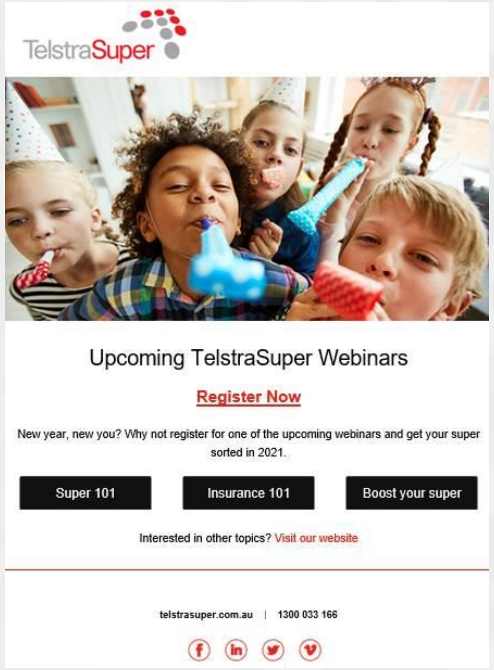
- Annual Review of your circumstances and financial plan, with a written summary of the outcome
- Proactive contact, during the year, from your Planner
- Contact from your Planner to discuss the impact of any legislative changes that may affect your advice
- Your Planner and their support team are available to you any time during normal business hours
- Additional advice on a broader range of topics provided at a 50% discount to the standard fees

NEXT STEPS

NEXT STEPS

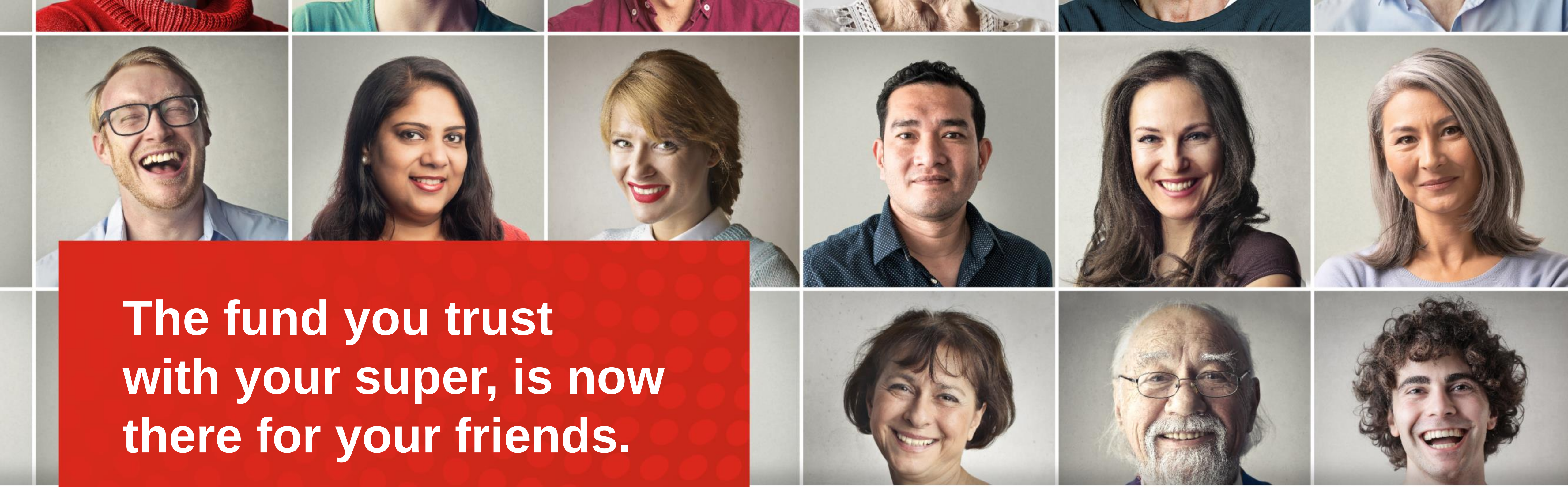
How do I access advice





1300 033 166

Financial advice is provided by Telstra Super Financial Planning Pty Ltd (TSFP) AFSL 218705. TSFP is wholly owned by TelstraSuper Pty Ltd (TSPL) in its capacity as trustee for the Telstra Superannuation Scheme (TelstraSuper). Refer to the TSFP Financial Services Guide (FSG) on our website (www.telstrasuper.com.au), dated 6 September 2021 for important information about the services.



The fund you trust with your super, is now there for your friends.

Invite a friend. We’ll do the rest.

telstrasuper.com.au/refer

Competitive fees

Profits back to you

Strong long-term performance

Simple advice on you super

When we win, you win!

Responsible investors

Happy to answer your questions.

1300 033 166
8:30am - 5:30pm (Melbourne time) Monday to Friday

talkingsense@telstrasuper.com.au

telstrasuper.com.au

As a leading profit-to-member fund, TelstraSuper is committed helping our members build a financially secure future.
As a current TelstraSuper member, you are able to refer friends and family members to join TelstraSuper.