

ClearView **WealthSolutions** Investments IDPS Guide

Update pursuant to ASIC Class Order 13/763

Date issued 1 July 2021

The information in this notice dated 1 July 2021 provides non-materially adverse updates to the WealthSolutions Investments Investor Directed Portfolio Service (**IDPS**) Guide dated 4 May 2021 (**IDPS Guide**). This update is issued by ClearView Financial Management Limited ABN 99 067 544 549 AFSL 227677 (**CFML**) as Operator of the IDPS. It should be read together with the IDPS Guide, which is available at clearview.com.au.

About this update

This update incorporates information on the following:

- 1 Changes to the Advice fee consent requirements.

Changes to the IDPS Guide

Advice fee consent requirements

From 1 July 2021, your consent to deduct any fees paid on an ongoing basis to your financial adviser must be renewed annually through your financial adviser. If you do not renew your consent, these fees will expire.

You can also enter into fixed-term fee arrangements with your adviser and provide your consent to deduct fees for a period of up to 12 months.

You can vary or revoke your consent in writing at any time, either through your adviser or by contacting us directly. Should you wish to revoke your consent to the deduction of any fees, please contact us and/or your adviser to terminate the fee arrangement. Note this will prevent any further deduction of advice fees from your account after the consent has been revoked but does not reverse any fees paid before revocation.

Need more information?

Please speak to your financial adviser or contact WealthSolutions Service Centre on **1300 854 994**.

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