**Website Disclosure Requirements**

|  |
| --- |
| **Compulsory disclosure information on your site** |
| **Each AR listed on the website must identify that they are an Authorised Representative of the Licensee** | **Corporate entity**Martin White of Jacoby Cameron Financial Pty Ltd is an Authorised Representative of Count Financial Limited. |
| **Include disclosure regarding Count and Count’s ownership** | Jacoby Cameron Financial Pty Ltd *is an Authorised Representative of Count Financial Limited ABN 19 001 974 625 AFSL No. 227232 which is 85% owned by CountPlus Limited ABN 111 26 990 832 (CountPlus) of Level 8, 1 Chifley Square, Sydney 2000 NSW and 15% owned by Count Member Firm Pty Ltd ACN 633 983 490 of Level 8, 1 Chifley Square, Sydney 2000 NSW. CountPlus is listed on the Australian Stock Exchange. Count Member Firm Pty Ltd is owned by Count Member Firm DT Pty Ltd ACN 633 956 073 which holds the assets under a discretionary trust for certain beneficiaries including potentially some corporate authorised representatives of Count Financial Ltd. The information on this web page is not advice and is intended to provide general information only. It does not account of your individual needs, objectives, or personal circumstances* |
| **Australian Business Number (ABN)** | Must be placed alongside or beneath your Corporate Authorised Representative name. For companies or unit trusts with a corporate trustee trading under a **Registered Business Name (RBN)**, the RBN may be used in place of the company name but must be immediately followed by the ABN (or ACN in the case of a Corporate Trustee).. |
| **Copyright infringement** | Your website might contain or use third party copyright material that you do not own. You should protect yourself from infringing third party copyright rights (e.g. obtaining permission from the owner to use copyright material). |
| **Currency of information** | As the owner of the website, it is your responsibility to ensure that your personal and business information remains up to date and relevant to financial services. Where your information contains legislative information which is subject to change, include the following:*Information on this website is based on current regulatory requirements and laws, which may be subject to change. While care has been taken in the preparation of this information, no liability is accepted by Count, its related entities, agents and employees for any loss arising from reliance on information within.* |
| **Documentation and disclaimers** | Key documents and disclaimers must be readily available on your website homepage via ‘tabs’, for example as identified below.Your website is to include the latest version of the:* Financial Services Guide (FSG) (if you choose to include the FSG)
* General advice disclaimer;
* Security and privacy statements; and
* Terms and conditions.
 |
| **The address of the business** | Business street address is compulsory.Postal address is optional. |
| **Contact Details** | Phone, fax, mobile and email etc. |
| **Count Logo** | Please refer to the Brand Guidelines, in the Supporting Tools, for instructions relating to the use and placement of the Licensee's logo.The use of your logo must not be misleading or confusing in that it creates the impression that you, as the Authorised Representative or corporate entity, are an AFS Licensee holder.You are not required to display the ‘Member of Count’ logo, however it is encouraged. |
| **General advice warning** | Your website must not contain any personal advice. If your website contains general advice, you should include the following disclaimer:*The advice provided here is general in nature only as, in preparing it we did not take account of your investment objectives, financial situation or particular needs. Before making an investment decision on the basis of this advice, you should consider how appropriate the advice is to your particular investment needs, and objectives. You should consider the relevant Product Disclosure Statement before making any decision relating to a financial product.* |
| **Separation of financial planning services** | Your financial planning and accounting services should be separated. Ideally on separate pages. Or it should be made clear which services fall under Count’s AFSL.This may be done with an asterisk (\*) where an AFSL service is listed, leading to the Count disclaimer at the bottom of the page.Services should be separated into different web pages or lists where possible. The following disclaimer should be included where services accounting services are mentioned in proximity to financial planning services, or Count’s name:*Please note that any taxation and accounting services are not endorsed nor the responsibility of Count Financial Limited.* |
| **Subscribe/Unsubscribe** | If you collect client information on your site and intend to use it to send electronic messages (meaning via email, SMS or instant messages), you must include a ‘subscribe’ and an ‘unsubscribe’ facility. You should include the following disclaimer on any page where client information is collected:Jacoby Cameron Financial Pty Ltd respects your privacy. If you do not wish to receive any further mail from us, please feel free to contact us on (02) 9267 7355 For more information about Jacoby Cameron Financial Pty Ltd privacy policy, please refer to <link to Privacy policy>. |