ABOUT YOUR ADVISER

Financial Services Guide - Part 2

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Wealth Arena Pty Ltd trading as

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There are two parts to the Financial Services Guide (FSG). This document is Part 2. This document forms part of, and should be read in conjunction with, the FSG Part 1. If you have not received the FSG Part 1, please ask your Adviser, or contact ASVW Financial Services directly.

ASVW Financial Services authorises your Adviser to distribute this document.

Please take the time to review both the FSG and About Your Adviser before engaging our services.

About Me

Jessica is an experienced Financial Adviser who began her career in the industry in 2015. She initially worked in compliance and paraplanning, but after completing her Diploma of Financial Planning in 2017, she obtained her license to become a financial adviser. With over 20 years of experience in business administration and customer service, Jessica discovered her passion for helping clients with their financial and insurance needs. She has since worked with small boutique firms on the Mornington Peninsula, providing holistic financial advice.

I hold the following qualifications:

- Master of Financial Planning
- Graduate Diploma of Financial Planning

Authorisations

I am authorised in the following financial services and product:

- Superannuation
- Pensions and Annuities
- Cash and Term Deposits
- Managed Investments
- Listed Securities (shares and other products)
- Investment Bonds
- Life Insurance
- Centrelink/Veterans Affairs Assistance
- Budgeting and Cashflow Management
- Debt Management

Remuneration

The cost of providing financial advice and services to you including initial consultations, strategy development, product considerations, a Statement of Advice and ongoing reviews will depend upon the nature and complexity of the advice and/or service provided. Jessica will discuss and agree upon the fee structure with you before she provides you with advice or services. Fees for the advice and services provided may be based on either a fee for service arrangement, commission basis, or combination of both.

The relationship between ASVW Financial Services and Wealth Arena is an arrangement through a flat fee agreement. This agreement stipulates that 100% of remuneration is paid to Wealth Arena. Therefore, ASVW Financial Services will retain 0% and the Wealth Arena will receive 100%. Of the revenue received by Wealth Arena, Jessica is paid a salary, and is eligible for distributions and profits from Wealth Arena.

Service & advice fees paid by you

All fees and commissions are GST inclusive and fees could be greater than those disclosed below in complex cases. In these instances, Jessica will inform you of the exact fee payable promptly in writing.

Your initial consultation is complimentary.. At this meeting, Jessica will explain the advice process, what you can expect and the relevant fees and/or commissions that may be applicable.

All fees and/or commissions payable by you will be explained to you at the time your advice is provided and will also be detailed in a Statement of Advice or Record of Advice and Product Disclosure Statement(s).

You will have the ability to select your preferred payment option from the options below prior to the provision of advice

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Initial Remuneration	
Advice Preparation Fee	$1,100 to $6,600
Implementation Fee	3.3% on investments < $150,000 2.2% on investments between $150,000 to $499,999 1.1% on investments between $500,000 to $749,999 0.825% on investments of $750,000 or above
Strategy Advice	$1,100 to $6,600
Execution Only	$550 per hour
Insurance Claims Handling	$3,300
Insurance Commission – Initial [2]	Up to 66% [3]
Ongoing Remuneration	
Adviser Service Fee (Flat fee)	$1,650 to $22,000 per year
Adviser Service Fee (Asset based) 4	Up to 1.65% per year
Insurance Commission - Ongoing [2]	Up to 35% per year
Other Remuneration	
Hourly Rate	$550 per hour

1 Based on a % of the insurance claim paid.

2 Based on a % of insurance premiums.

3 Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020 commission of up to 130% will apply to additional cover.

4 Based on a % of funds invested.

For example, a 1% Adviser Service Fee based on a $200,000 investment would equal a $2,000 fee payable.

Benefits, interests & associations

The financial planning business and I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Referral Parties
Lakewood Accounting

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For more information:
Please visit www.moneysmart.gov.au for more information on financial advice.

ASVW FINANCIAL SERVICES