Financial Services Guide

PART 2 OF 2

Elders Financial Planning

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ADVISOR DETAIL

Brendan O'Rourke is the person who is providing the financial services to you. His ASIC Authorised Representative Number is 330763. Brendan is a Director of Geelong Wealth Advisers Pty Ltd, as trustee for the GWA Unit Trust (ABN 16 117 195 800; ASIC Authorised Representative Number 450473), which trades as Elders Financial Planning Geelong.

Brendan O'Rourke is an Authorised Representative and Geelong Wealth Advisers Pty Ltd as trustee for the GWA Unit Trust, trading as Elders Financial Planning Geelong is a Corporate Authorised Representative of Elders Financial Planning Pty Ltd, Australian Financial Services License Number 224645.

Brendan joined the financial services industry and has worked as an Adviser Since 1995. Brendan holds an Advanced Diploma in Financial Services. He has expanded his knowledge by completing additional specialist training in the areas of Self Managed Super Fund advice, Gearing and Direct Shares.

As an Authorised Representative, Brendan works in the best interests of his clients and believes in helping them build a comprehensive program to make the most of their earning potential during their working years, as well as helping them with their retirement planning, superannuation, risk insurance and estate planning needs. He achieves this by striving to provide quality advice, personalised service and practical ideas to deliver superior solutions that his clients can easily understand.

SERVICES

Brendan is authorised to provide advice on the following:

- Wealth creation strategies
- Investment Planning
- Superannuation Planning, including SMSF
- Retirement Planning
- Risk insurance strategies
- Estate planning
- Gearing strategies
- Direct Equities
- Aged Care

REMUNERATION

Elders Financial Planning Geelong and Brendan O`Rourke receive a portion of the fee for service paid by clients.

Fees that may be applicable for preparing your advice include:

- Statement of Advice Preparation: $1,100 to $11,000 depending on time and complexity of the advice document, calculated on an hourly rate of $450. Initial Commissions may be taken in payment of Statement of Advice fees. An estimated cost will be provided prior to the commencement of any work.

- Ongoing Fees: these will vary depending on the ongoing service arrangement you negotiate.

Initial and Ongoing commission is also payable by some product providers, depending upon the insurance premium amount.

All fees will be fully disclosed in a formal advice document.

NB: Costs include GST.

Brendan O`Rourke
Authorised Representative

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