

Adviser Profile

Authorised Representative of	
Corporate Authorised Representative No	

Version 1.0 – 1 July 2016

This Adviser Profile forms the second part of the Unison Wealth Management Financial Services Guide (FSG). This Part 2 provides important information about me and my employer, and must be read in conjunction with Part 1. In this document, the words “me”, “I”, “we” and “our” refer to

as an Authorised Representative of Unison Wealth Management Pty Ltd.

Your Private Client Adviser	
Profile	<p>is a Corporate Authorised Representative of Unison Wealth Management Pty Ltd. Our primary duty is to provide you with appropriate General Advice only and recommendations that are consistent with your financial needs and objectives. Furthermore, it is our duty to provide appropriate solutions based on the information provided by you. Our Tax & Compliance work continues to be provided by</p>
Experience	<p>is an Authorised Representative of and is responsible for the delivery of General Advice only solutions to clients.</p> <p>has years' experience in the superannuation / tax advisory area.</p>
Contact details	<p>Office Address: <input type="text"/></p> <p>Phone: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Email: <input type="text"/></p>
Authorisations	<p>is authorised to provide general advice and deal in the following:</p>
SMSF Advice	<p>Provide General Advice only (as defined in s766B Corporations Act 2001 (Cth)) to retail and wholesale clients on:</p> <ul style="list-style-type: none"> - self-managed superannuation funds; - superannuation products in relation to a client's existing holding in a superannuation product but only to the extent required for: <ul style="list-style-type: none"> a. making a recommendation that the client establish a self-managed superannuation fund; or b. providing advice to the client on contributions or pensions under a superannuation product.
Class of Product Advice	<p>Provide class of product advice (as defined in s912A(4) of the Corporations Act) to retail and wholesale clients on:</p> <ul style="list-style-type: none"> - superannuation products; - securities; - simple managed investment schemes; - general insurance products; - life risk insurance products; - basic deposit products

Your Private Client Adviser	
How am I paid for financial services I provide	<p>I receive a salary as an employee of</p> <p>I could also receive a performance bonus.</p>
Fees/Commissions	<p>Fees are charged for my initial advice and the preparation of a Statement of Advice (SoA). Fees are based on the complexity of the advice provided and range from \$1,000 (minimum) to \$3,000 (maximum) exclusive of GST for the Statement of Advice Only. I will provide an estimated cost, which we will agree on before commencing any work. This will include any fees relating to additional work required depending on the complexity of the required strategy.</p> <p>You will be sent an invoice and payment is required within 7 business days from the invoice date. Please note that my initial advice fees still apply where you decide not to implement my advice.</p> <p>Subsequent Service Fees: Fees for ongoing services and reviews are all based on an annual fee, ranging from \$1,000 to \$3,000.</p> <p>All fees may be deducted from your SMSF.</p> <p>All fees are exclusive of GST.</p> <p>NOTE: Full details of all fees for our General Advice will be provided to you in a Statement of Advice (SOA), or Record of Advice (ROA) at the time of receiving any recommendation.</p>
Fees to employer and other related entities	All fees and incentives are received by