

Adviser Profile

Super Advice Corporate Services Pty Ltd

Corporate Authorised Representative of Gallagher Benefit Services Pty Ltd

Version 1.0, Issued 1 September 2018

This profile is part of the Financial Services Guide (FSG) and is only complete when the FSG is attached.

Robert O'Shea

Robert O'Shea is a representative of Gallagher Benefit Services Pty Ltd.

Phone: 1300 557 782

Email: robert@super-advice.com.au



Education and qualifications

- Graduate Diploma in Applied Finance & Investment
- Graduate Certificate in Financial Planning
- Bachelor of Business – Finance & Marketing

Experience

Robert has over 10 years experience in the superannuation industry including 3 years as an Actuarial Analyst and Account Executive with Mellon. Prior to joining Super Advice Robert worked with AMP/AXA in a variety of roles including Corporate Advice Specialist for the WANT/SA region.

Roles and responsibilities

Robert ensures the best possible solutions and high quality service are provided to clients on a daily basis, whilst developing long term relationships.

Robert strives to help clients maximise their employee benefits.

Key responsibilities include:

- Assessing and understanding company superannuation requirements
- Assisting employers maximise their employee benefits
- Tender management of employer default superannuation arrangements
- Negotiating terms to obtain optimum group insurances for employers
- Ongoing management of employer group benefits and claims
- Delivering member education programs and general financial advice to employees

Advice Robert can provide

Robert is authorised to provide general advice and deal in the following financial products:

- Superannuation
- Life risk insurance products

Service fees

We are committed to providing you with comprehensive service and advice to ensure that you meet your stated objectives.

Additional services are obtainable from Super Advice Corporate Services Pty Ltd and charged to you at the following hourly rates:

- \$330 per hour for a financial planner.
- \$220 per hour for an associate financial planner and / or paraplanner.
- \$110 per hour for administrative support.

Please refer to the Financial Services Guide for a detailed explanation of other fees that may be payable for any financial advice provided to you.

How Robert is paid

Super Advice Corporate Services Pty Ltd is owned by Gallagher Benefit Services Pty Ltd. Gallagher Benefit Services Pty Ltd will retain 100% of the gross revenue received for the recommended financial services and/or products.

Robert is a salaried employee of Super Advice Corporate Services Pty Ltd. Robert may be eligible to receive a performance bonus from Super Advice Corporate Services Pty Ltd.

Appendix: Privacy Collection Statement

As part of the financial planning process, we need to collect information about you. Where possible we will obtain that information directly from you, but if authorised by you we may also obtain it from other sources such as your employer or accountant. If that information is incomplete or inaccurate, this could affect our ability to fully or properly analyse your needs, objectives and financial situation, so our recommendations may not be completely appropriate or suitable for you.

We are also required under the *Anti-Money-Laundering and Counter-Terrorism Financing Act (AML/CTF) 2006* to implement client identification processes. We will need you to present identification documents such as passports and driver's licences in order to meet our obligations.

We keep your personal information confidential, and only use it in accordance with our Privacy Policy. Some of the ways we may use this information are set out below:

- Your adviser may have access to this information when providing financial advice or services to you;
- Your adviser may, in the future, disclose information to other financial advisers and brokers to review customers' needs and circumstances from time to time, including other companies within the Arthur J. Gallagher Group;
- Your information may be disclosed to external service suppliers both here and overseas who supply administrative, financial or other services to assist your adviser and the Arthur J. Gallagher Group in providing financial advice and services to you;
- Your information may be used to provide ongoing information about opportunities that may be useful or relevant to your financial needs through direct marketing (subject to your ability to opt-out as set out in the Super Advice Privacy Policy);
- Your information may be disclosed as required or authorised by law and to anyone authorised by you.

Your adviser will continue to take reasonable steps to protect your information from misuse, loss, and unauthorised access, modification or improper disclosure. You can request access to the information your adviser or Licensee holds about you at any time to correct or update it as set out in the Super Advice Privacy Policy. The Super Advice Privacy Policy also contains information about how to make a complaint about a breach of the Australian Privacy Principles. For a copy of Super Advice's Privacy Policy please contact us.

Our contact details

Super Advice Corporate Services Pty Ltd

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Gallagher Benefit Services Pty Ltd

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Changes to this Adviser Profile

Information in this document may change from time to time. We may make such changes by amending the Adviser Profile and publishing an updated version on our website. You may also obtain a printed copy of the updated information by calling 1300 557 782.