

Representative Profile

Super Advice Corporate Services Pty Ltd

Corporate Authorised Representative of Gallagher Benefit Services Pty Ltd

Version 1.1, Issued 18 March 2018

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

Kieren James AFP®

Your financial adviser, Kieren James (ASIC number 001273409), is an authorised representative of Gallagher Benefit Services Pty Ltd.

Phone: 1300 557 782

Email: Kieren_James@ajg.com.au



Education and qualifications

- Graduate Diploma in Financial Planning
- Bachelor of Commerce in Banking and Finance
- Margin Lending Facilities

Kieren has the assistance and support from the client service and support staff. Please feel free to call upon the support staff team at any time for information in relation to the processing of applications and any general enquiries.

Experience

Kieren has over 14 years experience in financial services in a range of positions. Kieren has substantial experience providing financial planning advice to a wide range of individuals, families and businesses, and has strong relationship skills formed through his experience in various business development roles. Kieren also understands the many challenges faced by small businesses and their executives gained through over four years of first hand experience working in an executive role for an indoor skydiving company.

Memberships

Kieren is a member of the Financial Planning Association of Australia (FPA).

Advice Kieren can provide

Kieren can provide you with strategic advice as well as arrange the types of financial products listed below.

Kieren can help you to identify the types of services and products that will be appropriate to meet your financial goals. In addition, you can choose whether to receive advice about a range of needs all at once, or only those needs that are most important to you so that your most important goals are achieved first. Further advice can then be provided over time about any other needs or goals as required.

Strategies

- Superannuation planning
- Retirement planning
- Risk and insurance analysis
- Savings and wealth creation strategies
- Investment planning
- Gearing strategies

Products

- Deposit and payment products
- Superannuation
- Life products including:
 - Investment life insurance products and
 - Life risk insurance products
- Securities
- Interests in managed investment schemes including Investor Directed Portfolio Services
- Standard margin lending facilities
- Retirement Savings Accounts

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 on request and you will be advised of any associated costs before our services are provided. Additional services are 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 Kieren 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. Kieren is a salaried employee and may be eligible to receive a performance bonus.

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:

- The representative and our staff may have access to this information when providing financial advice or services to you;
- The representative and our staff 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 the representative 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 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 the Licensee holds about you at any time to correct or update it as set out in the Privacy Policy. The Privacy Policy also contains information about how to make a complaint about a breach of the Australian Privacy Principles. For a copy of the 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 Representative Profile

Information in this document may change from time to time. We may make such changes by amending the Representative 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.