

### ADVISOR DETAIL

Fenton Financial Services (TAS) Pty Ltd, as trustee for Fenton Family Trust (ABN 54 214 486 695; ASIC Authorised Representative Number 317019) is the entity that is providing financial services to you. Brendan O'Rourke (ASIC Authorised Representative Number 330763) is the financial advisor who is providing the advice on behalf of Fenton Financial Services (TAS) Pty Ltd, as trustee for Fenton Family Trust.

Brendan O'Rourke is an Authorised Representative and Fenton Financial Services (TAS) Pty Ltd as Trustee for Fenton Family Trust, trading as Elders Financial Planning Launceston is a Corporate Authorised Representatives of Elders Financial Planning Pty Ltd, ABN 48 007 997 186; 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

Fenton Financial Services (TAS) Pty Ltd, as trustee for Fenton Family Trust will receive a portion of the fee for service paid by clients and/or the brokerage/commission paid by product issuers to Elders Financial Planning Pty Ltd. The specific amount will be disclosed in further detail in the Statement of Advice document. Brendan O'Rourke is a salaried adviser of Fenton Financial Services.

Fees that may be applicable for preparing your advice include:

- Advice preparation fees range from \$1,650 and \$9,900 depending on time and complexity of the advice document. An estimated cost will be provided prior to the commencement of any work.
- Ongoing Service Fees will be calculated as a percentage of your total portfolio to a maximum of 1.10% per annum.
- Service Fees related to ad hoc advice and administrative matters may be charged at an hourly rate of \$275.

Initial and Ongoing Commission is also payable by some product providers, depending upon the investment or 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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