



ADVISER PROFILE

Gerrie de Wet | 1007639

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BUSINESS CONTACT DETAILS

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Odyssey Specialist Group ABN 14 152 106 477 | AFSL 508797 authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the Odyssey Specialist Group Financial Services Guide (FSG).

ABOUT ME

I commenced my career as a financial adviser in 2014 and became a representative of Odyssey Specialist Group on 18 June 2019.

I hold the following qualifications:

- Bachelor of Commerce – Accounting CPA Professional.
- Diploma of Financial Planning
- Certificate of Direct Equities
- Certificate of Self-Managed Superannuation Funds (SMSF)
- Certificate of Taxation Planning

I have satisfied the Financial Advisers Standards as per the Corporations Act and have been authorised to provide advice on the following financial services:

Superannuation and Retirement Planning
Personal Superannuation
Pensions and Annuities
Self-Managed Superannuation
Centrelink / Veterans' Affairs Assistance
Aged Care
Wealth Creation and Investments
Deposit Products
Investment Bonds
Managed Investments
Exchange Traded Products
Listed Securities (Shares and other products)
Wealth Protection
Personal & Business Insurance
Insurance Claims Assistance

Other Financial Planning Services

Gearing
Budgeting and Cashflow Management
Debt Management
Estate Planning Assistance

My remuneration

I am remunerated by:

- Salary and shareholder dividends

The following table summarises the types of fees or commissions that applicable to the services that I provide, which are paid to Odyssey Specialist Group as the Licensee.

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration Type	From	To
Implementation Fee	\$0	\$8,800
SoA Preparation Fee	\$990	\$11,000
Remuneration Type	Initial	Ongoing (pa)
Adviser Service Fee*	\$1,100 to \$11,000	\$1,100 to \$11,000
Insurance Commission*	0% to 66%^	0% to 33%

*Based on the complexity of circumstances and scope of advice.

^Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020 commission of up to 130% will apply to additional cover.

For example, a 66% Initial Insurance Commission on a \$1,000 annual premium would equal a \$660 fee payable by the insurer to the Practice.

Benefits, interests and associations

The business, associated entities or I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Related Parties

NEO Accounting Trust, trading as Odyssey Accounting and Tax – ABN 87 783 670 518

Odyssey General Insurance Group Pty Ltd – ABN 85 655 468 812

Shareholdings

Odyssey Specialist Group Pty Ltd

ClearVue Technologies Pty Ltd (CPV.ASX, CKJ.GR, CVUEF.US)

NEO Accounting Trust, trading as Odyssey Accounting and Tax – ABN 87 783 670 518

Other Exchange Traded Funds (ETF's)

Listed Securities