



ADVISER PROFILE

Keith Allen | 1293581

Version 2.0 | 1st September 2022



BUSINESS CONTACT DETAILS

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ABOUT ME

I commenced my career as a Financial Adviser in 2021 and became a representative of Odyssey Specialist Group on 01 April 2022.

I hold the following qualifications:

- Bachelor of Business – Majoring in Finance.
- Graduate Diploma of Financial 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

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 in writing and agreed with you at the time of providing advice.