



# ADVISER PROFILE

**Anthony Rosenberg | 278576**

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## BUSINESS CONTACT DETAILS

580 Stanley Street, South Brisbane QLD 4101

PO BOX 8004, Woolloongabba QLD 4102

**Phone:** 07 3315 2455

**Mobile:** 0412 789 747

**Email:** [tonyr@odysseysg.com.au](mailto:tonyr@odysseysg.com.au)

**Web:** [www.odysseysg.com.au](http://www.odysseysg.com.au)

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 2004 and became a representative of Odyssey Specialist Group on 28 February 2013.

I hold the following qualifications:

- Bachelor of Business
- Diploma of Financial Planning (ADFP)
- Certificate of ASX Securities
- Certificate of Self-Managed Superannuation Funds (SMSF)
- Certificate of Taxation Planning
- Master of Applied Finance

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 for 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.

### Related Parties

Odyssey Property Group Pty Ltd, trading as Odyssey Buyers Concierge – ABN 69 122 561 148

KITNF Pty Ltd, trading as Odyssey Property Concierge – ABN 52 640 229 232

### Shareholdings

Odyssey Specialist Group Pty Ltd

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

Other Exchange Traded Funds (ETF's)

Listed Securities