

# Financial Adviser Profile

## Overview

At Peak Advice, we provide clients with a high-quality, personalised service that's built on trust and ethical advice.

We help people from all walks of life to plan for, and ultimately enjoy a secure financial future and comfortable quality of life in retirement. We are a privately owned and operated business, meaning we are not owned by a fund manager, insurance company or any other financial institution.

Brendan is an experienced Financial Adviser having provided valuable advice and support to his clients since 2003. Brendan loves building long-term relationships with his clients, being a part of their financial journey and seeing them achieve their financial goals.

Brendan is skilled in all areas of advice and specialises in pre-retirement and retirement planning, maximising Centrelink entitlements, building and protecting wealth, retirement income solutions and aged care advice.

Brendan O'Reilly is a Sub-Authorised Representative of Peak Financial Solutions Pty Ltd (T/As Peak Advice), Corporate Authorised Representative No. 1286587. Authorised Representative No. 263996.

## Qualifications

Brendan O'Reilly holds a Bachelor of Business (Accounting) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Brendan O'Reilly is a member of CPA Australia and abides by their code of professional conduct and ethics.

## Authorisations

Brendan O'Reilly is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;
- Self Managed Superannuation Funds; and
- Securities



## Brendan O'Reilly

Peak Advice

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## Peak Advice - Advice Fees and Charges

Brendan O'Reilly will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Brendan's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. For new clients a Statement of Advice fee typically ranges from \$3,300 to \$9,900 incl. GST. You will be notified of the costs involved prior to the commencement of any work.

Brendan provides the option of ongoing reporting and advisory services. This fee generally starts from \$2,400 p.a. incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

For any other work carried out, you will be notified prior to the commencement of any work if applicable.

Peak Financial Solutions Pty Ltd (T/As Peak Advice) pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Brendan is a Director of Peak Financial Solutions Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Adviser May Receive

From time to time Brendan may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.