

ADVISER PROFILE

YOUR ADVISER

David Mounsey
Authorised Representative 296966

FCA Financial Pty Ltd
Corporate Authorised Representative
Representative No. 344586

Profile:

FCA Financial Pty Ltd is a specialised provider of advice. FCA Financial Pty Ltd is a business where our first focus is on meeting the specific and individual needs of our clients. The team at FCA Financial work together on each client to exchange ideas and experience to ensure financial needs and protection options can be explored to provide the best possible advice.

David has been individually authorised (Representative Number 296966) to provide financial product advice and deal in all of the below mentioned categories as a Director of FCA Financial Pty Ltd on behalf of Aon Financial Planning & Protection Limited.

Experience

David has 25 years experience in financial services having worked in both funds management and life insurance. Having held previous senior management positions within the financial services industry David has gained valuable knowledge on product, pricing, taxation, marketing and advice.

Qualifications:

David holds the following qualifications:

- Advanced Diploma Financial Services (AdvDip)
- Diploma in Financial Markets (SIA)
- Associate Australian Insurance Institute (AAII)

Professional Memberships:

David is a member of the Association of Financial Advisers

Contact Details:

Address	Level 51, 80 Collins St, Melbourne 3000 2 Yeramba Close, Upper Beaconsfield 3808	Phone:	03 5944 4813
Postal Address	PO BOX 24046, Melbourne 3000	Fax:	03 5944 4244

AUTHORISATIONS

David is authorised to provide financial product advice and deal in the following:

- (i) deposit and payment products limited to:
 - a. basic deposit products;
 - b. deposit products other than basic deposit products;
- (ii) life products including:
 - a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
 - b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- (iii) retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997);
- (iv) superannuation

Aon Financial Planning & Protection Limited
Australian Financial Services Licence No. 239183
ABN 13 091 225 642

This Adviser Profile has been authorised for distribution by Aon Financial Planning & Protection Limited
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FEES & CHARGES

Initial Consultation:	Free of charge
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Advice Preparation:	Completion of needs analysis: Free of charge Advice preparation: \$550 - \$2,750 The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required. Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.
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Implementation:	Up to 2.2% of funds under management with a minimum of \$550. This fee may be paid by cheque or collected from any investment product commission. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.
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Review Service:	A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 1.1%
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Consulting Fees:	Included in implementation and review fees.
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Commissions:	Refer to the Financial Services Guide for a detailed explanation of commissions that may be paid to me by product issuer(s).
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Note: All fees and charges quoted are inclusive of GST.