

Adviser Profile

Peter Jacob

Authorised Representative No. 412462

Credit Representative No. 430393



Alphington Private Wealth Pty Ltd

Corporate Authorised Representative No. 412463

Your Adviser

Profile	<p>Peter Jacob has been individually authorised (Representative Number 412462) to provide financial product advice and deal in all of the below mentioned categories as a Director of Alphington Private Wealth Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.</p>
Experience	<p>Peter has 17 years of experience in the wealth management and advisory industry. Prior to establishing Alphington Private Wealth he was the Head of Southern Region, Premium Wealth Services for Westpac Private Bank.</p> <p>Prior to his role at Westpac he held senior wealth management roles at ANZ Corporate and Institutional Banking and AXA Funds Management.</p> <p>This experience involved advising institutional super funds, corporates, ultra HNW and HNW clients and covered a range of asset classes, including private equity, property, equities and fixed interest, both direct and through various structures.</p> <p>Prior to completing his MBA he worked in the commercial property and forest industries.</p>
Qualifications	<p>Master of Business Administration (Melb. Bus. School) Grad. Dip. Applied Finance & Investment B. Sc. (Forestry)</p>
Professional memberships	<p>Fellow Financial Services Institute of Australasia Member of the Australian Institute of Company Directors Member of the French Australian Chamber of Commerce</p>
Contact details	<p>Physical address: Suite 4, 228 Clarendon Street, East Melbourne, VIC 3002</p> <p>Phone: 03 9038 9449</p> <p>Mobile: 0438 350 734</p> <p>Fax: 03 8678 1229</p>

Authorisations

Australian Financial Services License

Peter 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. general insurance products;
- iii. securities;
- iv. 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;
- v. interest in managed investment schemes including investor directed portfolio services;
- vi. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997);
- vii. superannuation; and
- viii. standard margin lending facility.

Australian Financial Services License

Peter is authorised to give credit assistance in relation to:

- how to structure debt;
- the suitability of existing loan structures; and
- repayment options.

Fees and charges

Advice preparation	Statement of Advice preparation: \$1,650 - \$5,500. 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.
Implementation	Up to 1.1% of funds being invested.
Wealth Management and Ongoing Advice	A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 1.375%pa. The minimum fee is \$5,500 pa.
Consulting fees	\$440 per hour. For any other service you require that is not specified above, we will charge you at the above hourly rate.
Credit assistance	Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by the loan provider(s). Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you in a Credit Quote.
Commissions	Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Peter Jacob is a Director of Alphington Private Wealth Pty Ltd and receives salary.

Note: All fees and charges quoted are inclusive of GST.

Aon Hewitt Financial Advice Limited

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