Adviser Profile

Peter Jacob

Authorised Representative No. 412462

Alphington Private Wealth Pty Ltd

Corporate Authorised Representative No. 412463

Peter Jacob

Your adviser

Contact details

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Profile

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.

Experience

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.

Prior to his role at Westpac he held senior wealth management roles at ANZ Corporate and Institutional Banking and AXA Funds Management.

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.

Prior to completing his MBA he worked in the commercial property and forest industries.

Qualifications and Certifications

Advanced Diploma of Financial Planning

Diploma Financial of Planning

Master of Business Administration (Melb. Bus. School)

Grad. Dip. Applied Finance & Investment

B. Sc. (Forestry)

ASX Listed Products Adviser

SMSF specialist

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. 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. securities;
iv. interest in managed investment schemes including investor directed portfolio services;
v. retirement savings accounts (“RSA”) products (within the meaning of the Retirement Savings Account Act 1997); and
vi. superannuation.

Fees and charges

Advice preparation

Statement of Advice preparation: $1,650 - $8,800

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.

$550 to $2,200

Wealth management and ongoing advice

A minimum ongoing service fee consisting of a flat fee of $4,090 - $12,500 plus 0.33% p.a. The minimum fee is $5,500 p.a

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.