

Adviser Profile

Financial Services Guide – Part B

Authorised Representative

Wayne Billington
Authorised Representative No: 230642

Wayne has been appointed as an Authorised Representative of Parkside InvestorPlus Pty Ltd (PIP), a Corporate Authorised Representative of the Licensee.

Diploma of Financial Planning,
Bachelor of Arts (Hons)
Diploma in Mineral Economics
Fellow SMSF Specialist Advisor™
Justice of the Peace



Contact Details

E: wayneb@parksideinvestorplus.com.au
P: (02) 9899 4899

Memberships

Financial Advice Association of Australia (FAAA)
SMSF Association
Australian Institute of Company Directors

Authorisations

Your Adviser is authorised by Parkside InvestorPlus Solutions Pty Limited (PIPS) to provide personal advice, general advice and deal in the following products;

- Deposit and payment products including basic deposit, deposit and non-cash payment
- Debentures, stocks or bonds
- Life Insurance - Investment products
- Managed Investment Schemes
- Retirement Savings Account Products
- Securities
- Superannuation

Our Services

We provide an extensive range of financial planning services, which include;

- Financial planning
- Retirement planning
- Wealth accumulation
- Superannuation and Self Managed Super Funds
- Analysis of your estate planning needs
- Cash flow and debt management
- Assistance with Centrelink entitlements
- Gearing strategies
- Comprehensive financial and investment strategies
- Business succession planning
- Remuneration packaging and redundancy
- Detailed Portfolio Review service

Our Process

In order to determine the services you require, and to prepare our recommendations, we will walk you through a three step process.

1. Initial Meeting; Determine your financial situation, assess your goals and what you would like to achieve. If we are unable to assist you there is no charge for the meeting.
2. Presentation of Recommendations; Present our recommendations, discuss the strategy, provide education for any complex concepts, and provide a Statement of Advice detailing our recommendation in writing for your consideration.
3. Review; Having had the opportunity to review and consider the recommendations we will discuss with you any questions, alterations, or clarification you may require.

Fees & Charges

Initial financial planning advice; The fee for initial advice is generally dependent on the nature and complexity of the advice. An initial fee will be agreed before providing any advice and this is based on individual circumstances and your adviser's assessment of the estimated time and complexity in providing advice. This fee will be disclosed in the Terms of Engagement document provided to you.

Ongoing financial planning advice; Establishing your financial strategy is important. Equally important is the ongoing advice to cater for changes in your personal circumstances, legislation and financial conditions.

The ongoing advice service we provide you will depend on your situation. The fee will be agreed to in advance with your financial adviser and may be paid annually, monthly or as per your agreement. This fee is a fixed dollar amount that is based on the complexity of your structure. The fee covers the cost to review the strategies and the products recommended in your Statement of Advice.

Ongoing fees may increase each year in line with the Consumer Price Index (CPI).

Additional advice; If you require advice services that exceed those initially agreed to, an additional advice fee may be charged. This will be agreed to prior to implementation.

Remuneration

Your Adviser is a part owner of the business and receives a salary and will benefit from any profits that are earned. Your adviser may receive bonuses, rewards or dividends based on their contribution to the total revenue of PIPS through the provision of quality advice and maintenance of ongoing client relationships. This is not an additional cost to you.

Benefits

Your Adviser may receive other benefits including attendance at professional development programs, conferences and other incentives such as allowances and other related entertainment benefits.

A public register is held by PIPS outlining the particulars of any benefits received.

This Adviser Profile dated 3 April 2023, should be read together with Part A of the Parkside InvestorPlus Solutions Pty Limited Financial Services Guide.

This Adviser Profile sets out the details of the Representative, the services and products they may provide and details of the remuneration Parkside InvestorPlus Solutions Pty Limited (PIPS), AFSL 225920 and the Representative may receive.

Adviser Profile

Financial Services Guide – Part B

Authorised Representative

Christine Britt-Lewis
Authorised Representative No: 230645



Christine has been appointed as an Authorised Representative of Parkside InvestorPlus Pty Ltd (PIP), being a Corporate Authorised Representative of the Licensee.

CERTIFIED FINANCIAL PLANNER® Professional
AEPS® Accredited Estate Planning Specialist
SMSF Specialist Advisor™
Accredited Aged Care Professional™
Graduate Diploma of Management
Justice of the Peace

Contact Details

E: christinebl@parksideinvestorplus.com.au
P: (02) 9899 4899

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SMSF Association

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- Cash flow and debt management
- Assistance with Centrelink entitlements
- Gearing strategies
- Comprehensive financial and investment strategies
- Detailed Portfolio Review service
- Aged Care Strategies

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