FINANCIAL PLANNER PROFILE

OVERVIEW

The Financial Planner Profile is part of the Financial Services Guide. You should read and consider this information when deciding whether to use our services.

YOUR FINANCIAL PLANNER – SIMON CAMMISS

Simon Cammiss has been advising a broad array of clients for well over a decade, helping solve complex financial situations and collaborating on strategic plans to achieve their objectives. Simon excels at seeing the broader picture and felt compelled to join a privately owned and operated wealth advisory licence where 'best in industry strategies' can be pursued.

Simon has an unwavering commitment to bettering his client's financial position, his own knowledge and expertise as well as helping people become more financially savvy. This involves frank discussions to uncover and prioritise a client's goals and thinking laterally to provide viable solutions in a clear and concise manner. Simon really values personal client relationships and takes great pleasure in seeing his clients accomplishing their objectives over time.

Simon is the proud father of three boys to wife Lucy, he loves to cook (and eat) and spend weekends relaxing with his family on the Bellarine Peninsula.

Resolute Financial Services Pty Ltd (AFSL No 510222) appointed Resolute Wealth Pty Ltd (Corporate Authorised Representative No. 1275864) and Simon Cammiss (Authorised Representative No. 1004074) as authorised representatives.

AREAS OF SPECIALISATION

Simon possesses extensive knowledge on the following:

- Investing in shares, managed funds, cash management accounts and fixed interest investments.
- Personal insurances;
- Aged Care & Centrelink;
- Debt management and cashflow budgeting;
- Superannuation strategies (including Self Managed Superannuation Funds);
- Retirement and pre-retirement planning.

SIMON CAMMISS

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QUALIFICATIONS

Simon holds a Bachelor of Business (Financial Planning), Masters of Applied Finance and is a Certified Financial Planner CFP®, as well as meeting the competency requirements under ASIC's Regulatory Guide 146.

PROFESSIONAL MEMBERSHIPS

Simon is a member of the Financial Planning Association of Australia (CFP®) abiding by their codes of professional conduct and ethics, in addition to being a member of the Tax Practitioners Board (TPB).

AUTHORISATIONS

Simon is authorised to provide advice and deal in the following financial products to retail and wholesale clients:

- Deposit and payment products
- Retirement savings accounts
- Securities
- Life products
- Superannuation;
- Managed investment schemes
- Debentures, Stocks or Bonds

REMUNERATION

Resolute Wealth Pty Ltd receives all remuneration it generates from its clients from Resolute Financial Services Pty Ltd and pays Resolute Financial Services Pty Ltd a fixed fee for licensee services such as compliance, research and insurance cover. In addition, Simon Cammiss and his associated and related parties hold an interest in Resolute Wealth Pty Ltd and is entitled to distributions and dividends made by this entity. His remuneration package is not linked nor related to specific investment recommendations but is related to individual performance and the profitability of Resolute Wealth Pty Ltd. All remuneration will be disclosed to you in a SOA or ROA you will receive before agreeing to any recommendation we may make.

INTERESTS

Resolute Wealth Pty Ltd is not owned by any Fund Manager or Institution.

Resolute Wealth Pty Ltd and its advisers, directors and their associated and related parties may have a financial interest in any of the financial products, or interests in the product issuers recommended. Where those interests constitute substantial interests within the meaning of the Corporations Act 2001 they will be disclosed to you in writing when advice is provided.

REFERRAL FEES

Where you have been referred to Resolute Wealth Pty Ltd or Simon Cammiss by a third party, any referral payments will be disclosed in your advice or disclosure document. Currently Resolute Financial Services Pty Ltd and Resolute Wealth Pty Ltd do not pay or entice any third parties for client referrals.