Financial Adviser Profile

Overview

Over the last 10 years, Mark has built MW Wealth Management into an award-winning practise recognised by IOOF and the Association of Financial Advisors. Mark has innovated the advice process solely to achieve better results for clients, specifically shifting habits, beliefs and strategies so clients realise their goals.

Mark Wyld is a Sub-Authorised Representative of MW Wealth Management Pty Ltd, Corporate Authorised Representative No. 402559. Authorised Representative No: 385196.

Qualifications

Mark Wyld holds a Bachelor of Commerce (Finance and Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Mark Wyld is a member of the Association of Financial Advisers (AFA) and abides by their code of professional conduct and ethics.

Authorisations

Mark Wyld is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation; and
- Self Managed Superannuation Funds.

Mark Wyld

MW Wealth Management

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Phone: 1300 159 866
Email: mark@mwwm.com.au

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MW Wealth Management Advice Fees & Charges

Mark Wyld will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Mark may charge a once-off fee for service fee, in this situation the product provider deducts this for the services provided to you in relation to your account. This fee may be up to 1.16 per cent of assets under advice and/or ranging from $550 to $5,500. The total fee will depend on complexity and time involved. Alternatively, you may elect to pay the once off fee for service by direct payment.

Mark's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. This fee ranges from $880 to $5,500 depending on complexity. Additionally, our current hourly based rate is $440 per hour. You will be notified of the costs involved prior to the commencement of any work.

Mark provides the option of ongoing reporting and advisory services. This fee may be from 1.1 percent to 2.2 per cent per annum of assets under advice or charged as a flat dollar fee ranging from $110 to $880 per month, or a combination of both options can be negotiated depending on the complexity of the advice and the agreed level of service being provided (all fees detailed above include GST). You will be notified of the cost involved prior to the commencement of any ongoing services.

MW Wealth Management pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Mark is a Director of MW Wealth Management and will receive a salary/benefit from this company.

Other Benefits Mark Wyld May Receive

From time to time Mark may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than $300. A register listing the details of any non-cash benefits between $100 and $300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

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