

ABOUT YOUR ADVISER

Thomas Morris is a Sub-Authorised Representative of MW Wealth Management Pty Ltd, Corporate Authorised Representative No. 402559. Authorised Representative No:001237004.

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Level 4, 459 Church Street, Richmond VIC 3121

☎ 1300 159 866

| ✉ clientservices@mwwm.com.au

| 🌐 www.mwwm.com.au

MW Grouping Pty Ltd (70 667 031 478 | AFSL 549199) authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the MW Grouping Financial Services Guide (FSG).

About Me

Over the last 7 years, Thomas has served as a licensed financial adviser, with over 12 years in the industry. In this role, he has focused on delivering exception client service and compliant advice documents. His goal is to ensure financial security for all his clients, therefore, in every strategy he takes pride in providing care and empathy for his clients stated needs whilst never losing sight of the overall financial objectives.

Authorisations

Thomas Morris 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;
- ☒ Superannuation; and
- ☒ Self-Managed Superannuation Funds.

Remuneration

Thomas is remunerated by:

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up to
SoA Preparation Fee	\$10,000
Implementation Fee	\$2,000
Hourly Rate	\$400

Education - Bachelor of Business (Economics and Finance) (Applied), Diploma & Advanced Diploma of Financial Planning, Diploma & Certificate IV of

Financial Services, Tax for Financial Advising, Ethics and Professionalism in Financial Advice.

Remuneration	Initial	Per Annum
Adviser Service Fee	Adviser Service Fee	Up to \$10,000
Adviser Service Fee (asset based) *	Adviser Service Fee (asset based) *	Up to 1.1%
Contribution Fee*	Up to 0%	Up to 0%
Insurance Commission*	0% to 66%^	0% to 35%

*Based on a % of funds invested or insurance premiums

^Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020 commission of up to 130% will apply to additional cover.

For example, a 1% Adviser Service Fee based on a \$200,000 investment would equal a \$2,000 fee payable.

Benefits, interests and associations

The financial planning business and I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Related Parties

MW Property Group

Infinity Group Australia Pty Ltd

Referral Parties

MW Property Group

Infinity Group Australia Pty Ltd