Financial Services Guide

PART 2 OF 2

Elders Financial Planning

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ADVISOR DETAIL

McLean Whittaker is the person who is providing the financial services to you. His ASIC Authorised Representative Number is 281040. McLean is a Business Owner of Martindales Financial Consulting Pty Ltd, (ABN 15 061 957 122; ASIC Authorised Representative Number 314994)

McLean Whittaker and Martindales Financial Consulting Pty Ltd are Authorised Representatives of Elders Financial Planning Pty Ltd, Australian Financial Services License No: 224645.

McLean brings over fifteen years experience in the Financial Services Industry, with modern flair, to Elders. During this time, he has been employed by two of Australia's major banks, ANZ and Westpac with very successful roles. McLean has spent the last 5 years specialising in private practice and has the exceptional gift of making the most complex situations, easy and understandable.

McLean holds a Diploma of Financial Advising (Dip FP) through the Securities Institute and has completed the equivalent through the Financial Planners Association (FPA). McLean has completed his Certified Financial Planner (CFP) certification which is the global symbol of excellence in financial planning. He is also a member of the FPA.

As an Authorised Representative, McLean believes in helping his clients build the complete program they need to maximise their earning potential during their working years, as well as helping them with their retirement planning, superannuation, managed investments and estate planning needs. He achieves this by providing quality advice, personalised service and practical ideas to deliver superior solutions

SERVICES

McLean is authorised to provide advice on the following strategies and products

- Savings and wealth creation strategies
- Investment Planning
- Superannuation Planning
- Retirement Planning
- Risk and insurance analysis
- Farm succession planning
- Cash Management Trusts
- Retirement Income Streams
- Managed Investments
- Master Trust products
- Superannuation products
- Personal and group Insurance

REMUNERATION

Martindales Financial Consulting Pty Ltd and McLean Whittaker receive a portion of the fee for service paid by clients or the brokerage/commission paid by product issuers to Elders Financial Planning Pty Ltd.

Fees that may be applicable for preparing your advice include:

- Statement of Advice Preparation: range from $0 to $5,000 depending on time and complexity of the advice document, calculated on an hourly rate of $250. Initial Commissions may be taken in payment of Statement of Advice fees. An estimated cost will be provided prior to the commencement of any work.
- Ongoing Fees: these will vary depending on the ongoing service arrangement you negotiate. Ongoing service fees can be between $750 to $20,000 and/or up to 40% of the annual insurance premium.

Initial and Ongoing commission is also payable by some product providers, depending upon the investment or insurance premium amount.

All fees will be fully disclosed in a formal advice document.

NB: Costs include GST.

McLean Whittaker
Authorised Representative

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