

FINANCIAL PLANNER PROFILE

Steve Trevisiol

This Financial Planner profile forms part of the Financial Services Guide (FSG) and must be read in conjunction with the first part of the FSG.



CONTACT INFORMATION

Steve Trevisiol conducts financial planning activities through Western Financial. If you would like to make an appointment to discuss your financial needs and objectives in more detail, please contact Steve on:

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Level 19, 140 St Georges Terrace, Perth, Western Australia 6000

PROFESSIONAL BACKGROUND

Steve Trevisiol is employed by WA Local Financial Services Pty Ltd, trading as Western Financial, and provides advice as an authorised representative of Quadrant First Pty Ltd AFSL No. 284443, ABN 78 102 167 877. Steve's ASIC authorised representative number is 429049.

Steve is a fully qualified financial planner with experience in Financial Services since 2002 and experience in the Financial Planning sector, predominantly in superannuation, since 2007. He has the following qualifications:

- Diploma of Financial Services (Financial Planning)
- Advanced Diploma of Financial Services (Financial Planning)
- Bachelor of Psychology
- Graduate Certificate in Management

Steve is a member of the following professional associations:

- Financial Planning Association of Australia

HOW STEVE TREVISIOL IS PAID

Steve receives a salary as an employee of Western Financial. No performance bonuses are paid if Steve meets certain activity targets, or for any fees that he may generate for Western Financial.

INITIAL ADVICE FEES

Fees are charged for Steve Trevisiol's initial advice and the preparation of a Statement of Advice (SoA). Fees are based on the complexity of the advice provided and range from \$0 (minimum) to \$6,600 (maximum) inclusive of GST. Steve will provide an estimated cost, which you will agree on before commencing any work.

SUBSEQUENT SERVICE FEES

Fees for ongoing services and reviews are all based on the complexity of the advice provided and range from \$0 (minimum) to \$6,600 (maximum) inclusive of GST.

PAYING FEES

You have the option of paying fees from your investment and/or your superannuation if the sole purpose test is met and the product provider allows it. Alternatively, we can arrange an invoice for you. Payment is required 10 working days from the invoice date.

Please note that Steve's advice fees still apply whether or not you decide to implement his advice.

Full details of all fees and commissions for financial services will be provided to you in a statement of advice and product disclosure statement at the time of receiving any recommendation.

AMOUNTS THAT WESTERN FINANCIAL AND OTHER RELATED ENTITIES RECEIVE

All fees, commissions and incentives are received by Western Financial.

REFERRALS

We do not pay a referral payment if you have been referred to us from someone else. Also we do not accept payment if we refer you to a third party.

AREAS STEVE TREVISIOL IS AUTHORISED TO PROVIDE FINANCIAL SERVICES IN

Steve is authorised by Quadrant First to provide Financial Services in the following areas of advice and products:

Advice

- Retirement planning
- Superannuation and rollovers
- Wealth creation
- Personal insurance
- Strategy and portfolio review services.

Products

- Managed investments
- Superannuation
- Personal insurance
- Deposit and banking products.

SERVICES STEVE TREVISIOL IS NOT AUTHORISED BY QUADRANT FIRST TO PROVIDE (IN ADDITION TO THE SERVICES LISTED ON THE FIRST PART OF THE FSG)

Steve is not authorised to provide advice, services or products in the following areas:

- Wills, power of attorneys and trusts
- Self managed superannuation funds - advice to establish a SMSF (Investment Advice only can be provided)
- Mortgage broking
- Geared investments and margin lending
- Finance broking.

Please ask Steve if you would like a referral for these services.