

About Your Adviser

EVALESCO FINANCIAL SERVICES PTY LTD

Corporate Authorised Representative No. 325313

This document forms part of and should be read in conjunction with the Australian Advice Network Financial Services Guide (FSG)

Contact details

Business Address

Suite 17.03, Level 17,
20 Bond Street
SYDNEY NSW 2000

T: 02 9232 6800

M: 0418 225 467

F: 02 9232 6700

E: jeff@evalesco.com.au

W: <http://www.evalesco.com.au>

Postal Address

GPO BOX 432
SYDNEY NSW 2001

JEFFREY THURECHT

Authorised Representative No. 250830

I am a Sub Authorised Representative and employee of Evalesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 1997 and became an adviser of the Australian Advice Network on the 1st August 2017. I am also a Member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Diploma of Financial Planning
- Advanced Diploma of Financial Planning
- Certificate of Margin Lending
- Certificate of ASX Securities
- CERTIFIED FINANCIAL PLANNER ®
- Certificate of Self Managed Superannuation Funds
- Certificate IV Finance/Mortgage Broking
- Bachelor of Information Technology
- Ethics & Professionalism in Financial Advice
- FASEA Financial Adviser Exam

Your Best Interests

I will act in your best interests at all times and I am bound by the law and also the Professional Code of the Financial Advice Association Australia (FAAA) and the Code of Ethics as governed by the Australian Securities and Investments Commission (ASIC).

I am committed to providing you with quality financial advice and a wide choice of products and/or services to suit your individual circumstances.

Services I Can Provide

I can provide financial advice and deal in financial products in relation to the following areas:

- Superannuation and Retirement Planning
- Managed Investments
- Financial Planning
- Risk Insurance
- Margin Lending
- Securities
- Self Managed Superannuation Funds
- Tax (Financial) Advice
- Estate Planning Strategies

My Remuneration

The cost of providing a financial advice service to you including initial consultation, strategy development, product considerations and a statement of advice including implementation of that advice will depend upon the nature and complexity of the advice and or service provided. You will be charged a fee-for-service for this. If we provide advice for insurance, this involves the payment of Brokerage/Commission and may cover the cost of your advice document.

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all forms of remuneration that will apply.

Full details of all fees and/or commissions will be outlined in the statement of advice that I will provide to you.

The relationship between Australian Advice Network and the Practice is a cost sharing agreement. This agreement stipulates that 100% of remuneration is paid to the practice. AAN will invoice the practice for their share of costs incurred by AAN in operating the licence. I am paid a salary and receive a profit share in the form of distributions by the Practice. Fees and/or commissions payable are separated into either initial or ongoing fees or commissions.

For initial advice, including the preparation of a Statement of Advice, the fee starts at \$4,400 (incl. GST) however this fee will vary depending on the complexity of the advice and the number of entities involved in the advice – for example, discretionary trusts, companies and self-managed superannuation funds.

Any ongoing fees can range up to 1.1% (including GST) of the investment amount or can be an agreed fee which will be reviewed annually.

If the practice is paid an initial commission for insurance products, it will receive 0% to 66% on the premium of the insurance. If the practice is paid an ongoing commission for insurance products, it will receive 0% to 22% on the premium of the insurance. This is not applicable where insurance is placed as a group risk policy inside superannuation or where the policy is for the benefit of the member of a default fund.

The following examples illustrate how the fees and commissions are calculated.

With a flat Statement of Advice fee of \$4,400, the Practice would receive \$4,400.

With a 1.1% Adviser Service Fee paid on a \$150,000 investment, the Practice would receive \$1,650.

On a \$3,300 per annum ongoing adviser service fee, the Practice would receive \$3,300 per annum.

On a \$1,000 annual insurance premium with an initial commission of 66%, the Practice would receive \$660.

On a \$1,000 annual insurance premium with an ongoing commission of 22%, the Practice would receive \$220.

My Referral Arrangements

Evalesco Financial Services will neither pay a third party nor receive payments from a third party for any referrals.

My Associations

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E: marshall@evalesco.com.au

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Postal Address

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SYDNEY NSW 2001

MARSHALL BRENTNALL

Authorised Representative No. 250831

I am a Sub Authorised Representative and employee of Evaluesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

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- Diploma of Financial Planning
- Certificate of Margin Lending
- Certificate of ASX Securities
- CERTIFIED FINANCIAL PLANNER®
- Certificate of Self Managed Superannuation Funds
- Certificate IV Finance/Mortgage Broking
- Bachelor of Business
- FASEA Financial Adviser Exam

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Postal Address

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SYDNEY NSW 2001

BELINDA MARLEY-WALLACE

Authorised Representative No. 335164

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I hold the following qualifications:

- Diploma of Financial Planning
- Bachelor of Business Administration (International Management)
- FASEA Financial Adviser Exam
- Certificate IV in Finance and Mortgage Broking
- Ethics and Professionalism in Financial Advice

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- Risk Insurance

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Postal Address

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MELODY EDWARDS

Authorised Representative No. 333079

I am a Sub Authorised Representative and employee of Evaluesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 2006 and became an adviser of the Australian Advice Network on the 1st August 2017. I am also a member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Master of Financial Planning
- CERTIFIED FINANCIAL PLANNER ®
- Certificate of Margin Lending
- Bachelor of Liberal Studies
- Certificate of ASX Securities
- Certificate of Self Managed Superannuation Funds
- Certificate IV in Financial Services (Finance/Mortgage Broking)
- FASEA Financial Adviser Exam
- Accredited Aged Care Professional

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W: <http://www.evalesco.com.au>

Postal Address

GPO BOX 432
SYDNEY NSW 2001

MIA TROTT

Authorised Representative No. 314482

I am a Sub Authorised Representative and employee of Evalesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 2006 and became an adviser of the Australian Advice Network on the 1st August 2017. I am also a member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Diploma of Financial Planning
- Advanced Diploma of Financial Planning
- Certificate of Self Managed Superannuation Funds
- Certificate IV in Finance and Mortgage Broking
- Accredited Listed Product Adviser Program
- Fellow Chartered Financial Practitioner
- FASEA Financial Adviser Exam
- Graduate Diploma of Financial Planning

Your Best Interests

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Postal Address

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SYDNEY NSW 2001

HUNG NGUYEN

Authorised Representative No. 1257045

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W: <http://www.evalesco.com.au>

Postal Address

GPO BOX 432
SYDNEY NSW 2001

Paul Luu

Authorised Representative No. 1001992

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I have worked in the financial services industry since 2005, and became a Financial Adviser of the Australian Advice Network on the 16th April 2024.

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- Advanced Diploma of Financial Planning
- Bachelor of Applied Finance and Commerce Actuarial Studies
- Kaplan Ethics and Professionalism in Finance Advice
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Any ongoing fees can range up to 1.1% (including GST) of the investment amount or can be an agreed fee which will be reviewed annually.

The following examples illustrate how the fees and commissions are calculated.

On a \$1,000 annual insurance premium with an initial commission of 66%, the Practice would receive \$660.

On a \$1,000 annual insurance premium with an ongoing commission of 22%, the Practice would receive \$220.

With a flat Statement of Advice fee of \$3,745, the Practice would receive \$3,745.

With a 1.1% Adviser Service Fee paid on a \$150,000 investment, the Practice would receive \$1,650.

On a \$3,300 per annum ongoing adviser service fee, the Practice would receive \$3,300 per annum.

My Referral Arrangements

Evalesco Financial Services will neither pay a third party nor receive payments from a third party for any referrals.

My Associations

At the date of my advice, the directors of Evalesco Financial Services Pty Ltd (my employer), through an associated entity, have shares in Australian Advice Network Pty Ltd (my licensee) and AAN Asset Management Pty Ltd (AANAM).

AANAM is the model manager for the AAN Model Investment series which may be utilised in investment recommendations in your advice. As a shareholder their associated entities may be entitled to dividends from AANAM.

About Your Adviser

EVALESCO FINANCIAL SERVICES PTY LTD

Corporate Authorised Representative No. 325313

This document forms part of and should be read in conjunction with the Australian Advice Network Financial Services Guide (FSG)

Contact details

Business Address

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T: 02 9232 6800

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F: 02 9232 6700

E: ashleigh@evalesco.com.au

W: <http://www.evalesco.com.au>

Postal Address

GPO BOX 432
SYDNEY NSW 2001

ASHLEIGH STEELES

Authorised Representative No. 1296215

I am a Sub Authorised Representative and employee of Evalesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 2018, and after completing my Professional Year, became a Financial Adviser of the Australian Advice Network on 7th December 2022. I am also a member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Bachelor of Commerce Financial Planning
- Bachelor of Arts
- FASEA Financial Adviser Exam
- Certificate of Ethics & Professionalism in Financial Advice

Your Best Interests

I will act in your best interests at all times and I am bound by the law and also the Professional Code of the Financial Advice Association Australia (FAAA) and the Code of Ethics as governed by the Australian Securities and Investments Commission (ASIC).

I am committed to providing you with quality financial advice and a wide choice of products and/or services to suit your individual circumstances.

Services I Can Provide

I can provide financial advice and deal in financial products in relation to the following areas:

- Risk Insurance
- Superannuation and Retirement Planning
- Managed Investments
- Financial Planning
- Estate Planning Strategies
- Tax (Financial) Advice

My Remuneration

The cost of providing a financial advice service to you including initial consultation, strategy development, product considerations and a statement of advice including implementation of that advice will depend upon the nature and complexity of the advice and or service provided. You will be charged a fee-for-service for this. If we provide advice for insurance, this involves the payment of Brokerage/Commission and may cover the cost of your advice document.

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all forms of remuneration that will apply. Full details of all fees and/or commissions will be outlined in the statement of advice that I will provide to you.

The relationship between Australian Advice Network and the Practice is a cost sharing agreement. This agreement

stipulates that 100% of remuneration is paid to the practice. AAN will invoice the practice for their share of costs incurred by AAN in operating the licence. I am paid a salary by the Practice.

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SYDNEY NSW 2001

VIRGINIA SCHREIBER

Authorised Representative No. 1305122

I am a Sub Authorised Representative and employee of Evalesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 2019, and completed my Professional Year as a Provisional Financial Adviser of the Australian Advice Network on the 13th December 2023.

I hold the following qualifications:

- Master of Financial Planning
- Bachelor of Applied Economics
- ASIC Financial Adviser Exam
- Self Managed Superannuation Fund

Your Best Interests

I will act in your best interests at all times and I am bound by the law and also the Professional Code of the Financial Advice Association Australia (FAAA) and the Code of Ethics as governed by the Australian Securities and Investments Commission (ASIC).

I am committed to providing you with quality financial advice and a wide choice of products and/or services to suit your individual circumstances.

Services I Can Provide

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- Risk Insurance
- Superannuation and Retirement Planning
- Managed Investments
- Financial Planning
- Self Managed Superannuation Funds
- Tax (Financial) Advice
- Estate Planning Strategies

My Remuneration

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W: <http://www.evalesco.com.au>

Postal Address

GPO BOX 432
SYDNEY NSW 2001

AMBER LIN

Authorised Representative No. 1270959

I am a Sub Authorised Representative and employee of Evalesco Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 325313) of Australian Advice Network Pty Ltd.

I have worked in the financial services industry since 2012, and became an adviser of the Australian Advice Network on the 1st July 2023. I am also a Member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Bachelor of Economics
- Advanced Diploma of Financial Planning
- FASEA Financial Adviser Exam
- Ethics & Professionalism in Financial Advice
- SuperConcepts & ICFS Specialist SMSF course

Your Best Interests

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- Superannuation and Retirement Planning
- Managed Investments
- Financial Planning
- Self Managed Superannuation Funds
- Securities
- Estate Planning Strategies

My Remuneration

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W: <http://www.evalesco.com.au>

Postal Address

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SYDNEY NSW 2001

JASMYN STEKOVIC

Authorised Representative No. 1299427

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I have worked in the financial services industry since 2018, and became a Financial Adviser of the Australian Advice Network on the 31st October 2023.

I hold the following qualifications:

- Graduate Diploma of Financial Planning
- Master of Financial Planning
- Bachelor of Business and Commerce (Property)
- ASIC Financial Adviser Exam

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