

## Adviser Profile

# Todd Rowson

Authorised Representative No. 267915

## Trumpet Financial Pty Ltd

Corporate Authorised Representative No. 327756

### Your adviser

#### Contact details

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#### Profile

Trumpet Financial is a boutique financial services company that provides advice in the following areas:

- Risk Insurance
- Business Succession Planning
- Financial Planning
- Tax Planning

Trumpet provides client with comprehensive management of their risk and financial planning needs. We take the time to make sure that you understand the strategies that we are advising you to implement.

Todd Rowson has been individually authorised (Representative Number 267915) to provide financial product advice and deal in all of the below mentioned categories as a Director of Trumpet Financial Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.

#### Experience

- Risk Insurance
- Business Succession Planning
- Financial Planning
- Tax Planning

#### Qualifications

Todd holds a Diploma of Financial Services (Financial Planning) and a MBA.

## Authorisations

### Australian Financial Services License

Todd is authorised to provide financial product advice and deal in the following:

- i. deposit and payment products limited to:
  - a. basic deposit products;
  - b. deposit products other than basic deposit products;
- ii. life products including:
  - a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
  - b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- iii. securities;
- iv. interest in managed investment schemes including investor directed portfolio services;
- v. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
- vi. superannuation.

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## Fees and charges

### **Initial consultation**

Free of charge

### **Advice preparation**

Completion of needs analysis: Free of charge

Advice Preparation: The actual fee for the preparation of advice is a fixed fee and will vary depending on the complexity of your situation and the advice required.

Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

### **Implementation**

This will be a fixed fee and will vary depending on the complexity of your situation and the complexity of the implementation.

The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

### **Review service**

An ongoing service fee will be calculated as a percentage of your total portfolio or a fixed fee and vary dependant on your ongoing service requirements.

### **Commissions**

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.