

ABOUT YOUR ADVISER



David van den Berg

Partner - Financial Adviser

Authorised Representative No. 263500

David has more than 20 years of experience providing advice to senior executives, small business owners and retirees. He has assisted many clients navigate growing their personal and business wealth and their transition to retirement.

Education, Qualifications & Memberships

- Bachelor of Commerce, Banking Finance and Risk Management (Griffith University)
- Master of Financial Planning (Griffith University)
- CERTIFIED FINANCIAL PLANNER® Professional
- Specialist Member of the SMSF Association
- Member of the Financial Advice Association of Australia (FAAA)



What kinds of advice is David authorised to provide?

David is authorised to provide financial product advice and deal in a financial product, to retail and wholesale clients, in relation to the following financial products:

- Basic deposit and payment products
- Debentures, stocks or bonds issued or proposed to be issued by a government
- Life products, including investment life insurance products and life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services – these are managed funds, master trusts and “wrap” accounts
- Retirement savings accounts (“RSA”) products
- Securities – meaning shares listed on the Australian Stock Exchange
- Standard margin lending facilities
- Superannuation, whether self-managed, personal super or corporate super

Providing Entity Authorisation

David is authorised to provide advice and services on behalf of the following entities, which are all owned by Adrians Wealth Management Pty Ltd | AFS License 522841

Entity	ABN	Corporate Authorised Representative (CAR) #
Adrians Private Wealth Pty Ltd	35 619 714 377	1257272

Remuneration

David is remunerated by a base salary and potential bonus. Any potential bonus is based on meeting individual key performance indicators and overall profitability of the business.

Benefits, interest, and associations

David is a shareholder in Adrians Capital Pty Ltd and may receive a dividend.

David does not have any other related parties, shareholdings or referral arrangements that may influence the advice provided to you.

David's Office & Contact Details

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