ABOUT YOUR ADVISER

Samuel (Sam) Turner

Financial Adviser
Authorised Representative No. 1317003

Sam started his financial advice career as a Client Services Officer, progressing through the roles of Paraplanner and Associate before becoming a Financial Adviser. In his work, Sam focuses on eliminating the stress of financial uncertainty through expert guidance and personalised strategies, so his clients can focus on achieving their goals with confidence and peace of mind.

Education, Qualifications & Memberships

- Bachelor of Business, Finance (University of Southern Queensland)
- Graduate Diploma of Financial Planning (Kaplan)
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Sam authorised to provide?

Sam 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
- Superannuation, including personal super and/or corporate super

Providing Entity Authorisations

Sam 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
Optimum Financial Planning Pty Ltd	42 159 437 573	425834
Optimum Financial Planning Services Pty Ltd (trading as Optimum Private Wealth	51 694 936 368	1320093

* Please refer to your advice document to confirm which CAR the advice was provided under.

Remuneration

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

Benefits, interest, and associations

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

Sam’s Office & Contact Details for Adrians Private Wealth

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