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 been with Adrians Private Wealth for 7 years and in that David has assisted many clients navigate through 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

Remuneration

David is remunerated by a base salary.

Your advice fee will be agreed upon based on your goals, needs and situation, and the complexity of the advice required. Not all fees will necessarily apply in every situation, and there is flexibility in how advice fees are charged; David will discuss this with you before you agree to proceed with any advice.

Your fee may be charged as a flat fee or percentage-based fee (or a combination of both) in agreement between you and David, within the ranges set below and a maximum percentage-based fee of 2.00%.

All amounts are inclusive of Goods & Services Tax (GST).

Initial Fees	Minimum	Maximum
Advice Preparation Fee	$3,300	$9,900
Implementation Fee	$550	$8,800
Hourly Rate	$550	

Adviser Service Fees	Minimum	Maximum
Advice Service Fee	$3,300	$66,000
Hourly Rate	$550	

For example, if you had a balance of $500,000 and the agreed fee with your adviser was a percentage-based Adviser Service fee of 1.10%, the amount you would pay would equal $5,500.

Insurance Commission	Initial	Ongoing
Insurance Commission	66%	22%

Benefits, interest, and associations

David is an Employee and Director of Adrians Private Wealth Pty Ltd.

David is a Director and Responsible Manager of Adrians Wealth Management Pty Ltd.

David is a Shareholder 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

Address: 60 Baxter Street, Fortitude Valley QLD 4006
Postal: GPO Box 1050, Brisbane QLD 4001
Email: david@adrianspw.com.au