ABOUT YOUR ADVISER

Dimitri Petridis

Partner - Financial Adviser
Authorised Representative No. 403728

Dimitri has over 25 years' experience in financial planning and investment advice. Dimitri's success has been built on providing personalised strategic advice coupled with a strong commitment to a proactive ongoing advisory relationship. It is this commitment and personalised service that ensures his clients, and their future generations celebrate the life they have worked hard to achieve.

Education, Qualifications & Memberships

- Bachelor of Commerce (Griffith University)
- CERTIFIED FINANCIAL PLANNER ® Professional
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Dimitri authorised to provide?

Dimitri 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

Dimitri 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; Dimitri 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 Dimitri, 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	$0	$16,500
Implementation Fee	$0	$16,500
Hourly Rate	$550	

Adviser Service Fees	Minimum	Maximum
Advice Service Fee	$0	$55,000
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

Dimitri is an Employee and Shareholder of Adrians Private Wealth Pty Ltd and may receive a dividend.

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

Dimitri's Office & Contact Details

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