ABOUT YOUR ADVISER

Garry Connelly AM

Partner - Financial Adviser
Authorised Representative No. 235862

Garry joined the Adrians team in October of 2023 as a Private Wealth Partner. Garry founded his own Financial Services practice, GCA Financial, 50 years ago which is now a part of Adrians. Garry has a passion for helping individuals and families secure their financial futures by providing personalised financial advice. Garry is a Sydney University graduate with majors in Maths, Physics and Psychology.

Education, Qualifications & Memberships

- Bachelor of Arts, Mathematics
- Advanced Diploma of Financial Planning
- Diploma of the Australian Institute of Insurance
- Diploma of Education
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Garry authorised to provide?

Garry 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

Garry is remunerated by a flat rate consulting fee.

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; Garry 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 Garry, 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	$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

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

Garry’s Office & Contact Details

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