

ABOUT YOUR ADVISER



Jackson Stark

Partner - Financial Adviser

Authorised Representative No. 1245533

Jackson joined the Financial Services industry since 2012, gaining experience in both SMSF Accounting & Financial Planning, and has been providing advice to clients since 2016. Jackson specialises in planning for business owners, high income families and clients from a rural background. Understanding each client has a unique set of circumstances, Jackson loves the opportunity to improve a client's wellbeing through reducing their potential financial anxieties.

Education, Qualifications & Memberships

- Bachelor of Commerce, Accounting and Finance (University of Southern Queensland)
- Advanced Diploma of Financial Planning (Kaplan)
- Accredited Aged Care Specialist
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Jackson authorised to provide?

Jackson 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, including self-managed, personal super or corporate super

Remuneration

Jackson 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; Jackson 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 Jackson, 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	\$2,750	\$11,000
Implementation Fee	\$2,750	\$11,000
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

Jackson is a Shareholder Adrians Capital Pty Ltd and may receive a dividend.

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

Jackson's Office & Contact Details

Address: 123 Margaret Street, Toowoomba QLD 4350

Postal: PO Box 2651, Toowoomba QLD 4350

Email: jackson.stark@adriansgroup.com.au