ABOUT YOUR ADVISER

Tim Barton

Partner - Financial Adviser
Authorised Representative No. 235863

Tim started with the Adrians team in October of 2023 as one of our Adrians Private Wealth Partners. Tim has more than 25 years of experience providing advice to management, small businesses, and pre/post retirees. He has assisted many clients navigate their financial journey through growing, protecting and preserving their wealth.

Education, Qualifications & Memberships

- Bachelor of Commerce (Griffith University)
- Graduate Diploma of Applied Finance & Investment (Securities Institute)
- CERTIFIED FINANCIAL PLANNER ® Professional
- Specialist Member of the SMSF Association
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Tim authorised to provide?

Tim 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

Tim 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; Tim 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 Tim, 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

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

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

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

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

Tim's Office & Contact Details

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