

# Brad Atkinson



This is Financial Services Guide (Part 2) and sets out specific details about Brad as an Authorised Representative of Grimsey Wealth. This document should be read in conjunction with Financial Services Guide (Part 1).



## Introducing your provisional financial adviser

Your Provisional Financial Adviser is Brad Atkinson (Authorised Representative 001297235)

When you first deal with Brad, it will become apparent that your goals are his main priority. He takes great pride in building and maintaining long-term relationships, while keeping you accountable to ensure you reach your goals. Brad believes and adopts the highest standards of ethics and compliance.

Brad commenced training as a Financial Adviser and enrolled in his Professional Year program in July 2021. As part of his Professional Year program, Brad is supervised by Joshua Wingrove (Authorised Representative 000293334).

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Grimsey Wealth Pty Ltd ('Grimsey Wealth')  
ABN 90 113 911 247  
Australian Financial Services  
Licence No. 293334 ('AFSL')

### CONTACT DETAILS

Should you have any questions you are able to contact Brad using the following details:

Level 4, 80 Market St,  
SOUTH MELBOURNE VIC 3205

Phone: (03) 9686 1784

Email: Brad@pursuewealth.com.au

Website: www.pursuewealth.com.au



## Qualifications and memberships

- Bachelor of Business (Financial Planning)

### Does your Provisional Financial Adviser have any associations or relationships that may influence their advice?

Brad is employed by Pursue Wealth, which is a wholly owned subsidiary of the Grimsey Group. As part of our advice, you may be referred to other entities within the Grimsey Group for related services including accounting, taxation, business advisory, SMSF administration, lending or mortgage services. Where you are referred to another Grimsey entity, the associated fees will be fully disclosed to you prior to the services being arranged.

### How can you provide your instructions to your Provisional Financial Adviser?

You may provide instructions by using any of details provided in this Financial Services Guide. Where instructions are provided by telephone, these must be confirmed in writing. Alternatively, you may provide instructions in person.

### How do we protect your personal information?

In addition to the information provided in the Financial Services Guide (Part 1) on how we collect, hold, use, disclose and manage your information, further detail regarding our commitment to your privacy can be found at <https://www.pursuewealth.com.au/pw-privacy-policy/>.



## Financial products and services

Brad is authorised by Grimsey to provide financial advice to retail clients in the following areas:

- Budget and cashflow
- Savings strategies
- Investment planning
- Superannuation planning for accumulation and retirement phases
- Insurance planning
- Debt management
- Estate planning considerations
- Tax Advice

Brad is authorised by Grimsey to provide financial advice on the following product types:

- Deposit products
- Managed investments
- Superannuation
- Life insurance
- Securities
- Government debentures, stocks & bonds

Brad is not authorised to provide financial advice on the following product types:

- Derivatives
- Self-Managed Super Funds
- Margin lending



## Service and advice fee structure

All fees and commissions disclosed in this Financial Services Guide (Part 1 and Part 2) which are attributed to the services provided to you, by Brad, are paid to Grimsey Wealth.

Grimsey Wealth receives all fees and commissions payable for the services provided under licence. Brad receives a salary as an employee of Pursue Wealth and may also receive discretionary bonus' as an employee of Pursue Wealth Pty Ltd, Pursue Property Pty Ltd & Grimsey Wealth Pty Ltd, determined by the companies as appropriate from time to time.

Your initial appointment is complimentary. At this meeting, Brad Atkinson will explain how Pursue Wealth Pty Ltd operates, what you can expect and the payment options. All fees and commissions payable by you will be explained to you at the time advice is given and will also be detailed in a Statement of Advice, Record of Advice and Product Disclosure Statement(s).