Part 2

ADVISER PROFILE

Samantha Robinson

Pursue Wealth
Achieve your dreams

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

Introducing your financial adviser

Your Financial Adviser is Samantha Robinson (Authorised Representative 000422102)

Samantha is passionate about her clients and the long-term relationships she holds with them. When discussing your goals with her you will realise that she is a firm believer in 'tough love' to ensure you achieve your dreams. Samantha believes and adopts the highest standards of ethics and compliance and is the Victorian Director of the Association of Financial Advisers (AFA).

Qualifications and memberships

- Advanced Diploma of Financial Planning
- Fellow Chartered Financial Practitioner (FChFP)
- Executive Director of the Association of Financial Advisers (AFA)
- Member of the Financial Services and Credit Panel (FSCP)

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

Samantha 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.

This Financial Services Guide (Part 2) has been authorised for distribution by the authorising licensee:

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 Samantha using the following details:

Level 4, 80 Market St,
SOUTH MELBOURNE VIC 3205

Phone: (03) 9686 1784
Email: sam@pursuewealth.com.au
Website: www.pursuewealth.com.au

How can you provide your instructions to your 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

Samantha is authorised by Grimsey to provide financial advice to wholesale and retail clients in the following areas:

- Budget and cashflow
- Savings strategies
- Investment planning
- Superannuation planning for accumulation and retirement phases
- Self-Managed Superannuation Funds
- Centrelink strategies
- Insurance planning
- Gearing and margin lending strategies
- Debt management
- Estate planning considerations
- Aged care advice
- UK pension transfer strategies
- Wholesale client advice
- Tax Advice

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

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

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

- Derivatives

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 Samantha, are paid to Grimsey Wealth.

Grimsey Wealth receives all fees and commissions payable for the services provided under licence. Samantha receives a salary as an employee of Pursue Wealth and may also receive distributions as a director 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, Samantha Robinson 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).