

About Your Adviser



Michael Bond

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Sun Private Wealth Pty Ltd

Authorised Representative No. 402978

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About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 2005 and became an authorised representative of Alliance Wealth Pty Ltd on 29 January 2020.

I hold the following qualifications:

- Bachelor of Commerce
- Diploma of Financial Services (Financial Planning)
- Self Managed Superannuation Funds Program
- Margin Lending and Geared Investments Course

I hold the following memberships:

- Practitioner Member of the Association of Financial Advisers

I am authorised to provide the following financial services:

Superannuation and Retirement Planning

Personal Superannuation
Corporate Superannuation
Industry and Public Sector Superannuation
Pensions and Annuities
Self-Managed Superannuation
Centrelink / Veterans' Affairs Assistance

Wealth Creation and Investments

Cash and Term Deposits
Investment Bonds
Managed Investments
Exchange Traded Products
Listed Securities (Shares and other products)
Margin Lending
Gearing

Wealth Protection

Term Life Insurance
Total and Permanent Disability (TPD) Insurance
Trauma Insurance
Income Protection Insurance
Business Insurance
Insurance Claims Assistance

Other Financial Planning Services

Budgeting and Cashflow Management
Debt Management

My Remuneration

I am remunerated by:

- Salary plus profit share

The licensee and I share fees and commissions according to a percentage split where the Practice retains 97.5% of any fee or commission and Alliance Wealth retains 2.5%.

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Type of Remuneration	From	To
SoA Preparation Fee	\$0	\$10,000
Hourly Rate		\$330

Type of Remuneration	Initial	Ongoing (pa)
Adviser Service Fee		\$0 to \$24,000
Adviser Service Fee*		0% to 2%
Insurance Commission*	0% to 66%^	0% to 31.13%

* Based on a % of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

For example, a 1% Adviser Service Fee based on a \$200,000 investment would equal a \$2,000 fee payable.

Benefits, Interests and Associations

The Business, associated entities or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.