

Adviser Profile

Wade McGirr *B.Bus GDipFinPlanning (Finsia) AFP® F Fin*

Wade has worked in the financial services industry since 1997 and specifically as a Financial Adviser since 1999.

With his extensive academic and industry experience, Wade is well qualified to help clients achieve their financial goals.

Experience, Qualifications & Professional Memberships

- Bachelor of Business degree from Monash University
- Graduate Diploma in Financial Planning from the Financial Services Institute of Australia (Finsia).
- Self-Managed Superannuation Funds through Kaplan Professional
- Margin Lending & Geared Investments through Kaplan Professional
- Certificate IV in Financial Services (Finance / Mortgage Broking) through AAMC Training Group
- Tax (Financial) Adviser through Tax Practitioners Board

Wade also holds the Affiliate (practitioner) Australia (FPA) and a Fellow membership with Finsia.

Wade has successfully completed the FASEA exam.

Yes, I am an authorised representative and a credit representative of Results Financial Services Pty Ltd.

Are you Authorised to provide Financial Services and products?

I am authorised by Results Financial Services Pty Ltd to provide the services listed in this financial services and credit guide. I am authorised to provide both general and personal financial product advice and to deal in the following kinds of products.

What Areas are you Authorised to Advise on?

- Deposit and Payment Products
- Debentures, Stocks and Bonds
- Managed Investments
- Superannuation
- Securities
- Personal Insurance
- Shares
- Self Managed Super Funds
- Margin Lending Standard
- General Credit Advice
- Aged Care Advice

How is your Adviser Paid?

Wade is an employee of Results Financial Services Pty Ltd and receives a salary plus a share in the profit of Results Financial Services Pty Ltd.

How will I Pay for Your Services?

All fees will be invoiced by Results Financial Services Pty Ltd. Fees can be paid directly by you, or deducted from the funds you invest.

Fees are Charged as follows:

- If I charge a fee for service, the rate will be \$360 per hour including GST. Before I provide the service, you will be provided with an estimate of the time that will be incurred.
- I may charge a Statement of Advice (SoA) or Credit Advice preparation fee based on the complexity of advice and time taken in preparing the advice, with a minimum fee of \$1,650 including GST being applied. You will be given an estimated cost which we will agree on before proceeding.
- Charges for ongoing review or further consultations for Portfolio Management can range from 0% to 2.00% p.a. of the total portfolio value or a fixed dollar fee, indexed to CPI annually for the service provided.
- All fees are payable directly to Results Financial Services Pty Ltd when the Statement of Advice Credit Advice is presented.

NOTE: Full details of all fees and commissions will be provided to you in a Statement of Advice, Credit Advice or Record of Further Advice and the Product Disclosure Statements at the time of receiving any recommendation.

Results Financial Services Pty Ltd.

If you would like to make an appointment to discuss your financial needs and objectives in more detail, please contact me on (03) 5134 3077 or 1300 796 663

I am Located at:

30-32 George Street, Morwell VIC 3840
PO Box 182, Bendigo VIC 3552

My E mail Address is:

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My Web Address is:

www.resultsfinancial.com.au

Results Financial Services AFSL / ACL:
225071

ASIC Authorised Representative No:
001006743

This Adviser Profile is part of the Results Financial Services Pty Ltd; Financial Services and Credit Guide, and must be read in conjunction with the main document. 14/05/2021

