



Financial Services Guide

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Licensee:

Eventus Wealth Management Pty Ltd (AFSL 335815)

Level 1, 73 Canadian Bay Rd
Mount Eliza VIC 3930

This Financial Services Guide (FSG) is authorised for distribution by Eventus Wealth Management.

Authorised Representatives:

Port Phillip Financial Services Pty Ltd
(ASIC# 253775 ABN 88 085 946 032)
Angela Pollard (ASIC# 255380)

Level 1, 73 Canadian Bay Rd
Mount Eliza VIC 3930

Authorised Representatives act on behalf of Eventus Wealth Management who is responsible for the services that they provide.

Purpose of this FSG

This FSG will help you decide whether to use the services that we* offer. It contains information about:

- The services we offer and their cost
- Any conflicts of interest which may impact the services
- How we are remunerated
- How we deal with complaints if you are not satisfied with our services.

* In this document 'we' refers to the Authorised Representatives listed above.

Eventus Wealth Management

Eventus Wealth Management holds an Australian Financial Services Licence. It is required to comply with the obligations of the Corporations Act and the conditions of its licence.

This includes the need to have adequate compensation arrangements in place with a Professional Indemnity insurer for the financial services that it and its current and past representatives provide.

Our services

We are authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities
- Margin lending

The financial advice process

We recognise that the objectives and personal circumstances of each client are different.

Where we provide personal advice, we will listen to you to understand your objectives and circumstances. We will also ask questions to make sure we provide advice which is in your best interests.

When we first provide personal advice to you it will be explained thoroughly and documented in a Statement of Advice (SOA) which you can take away and read.

The SoA will explain the basis for our advice, the main risks associated with the advice, the cost to you of implementing the advice, the

benefits we receive and any conflicts of interest which may influence the advice.

For administration platforms, managed funds and personal risk insurance products we will provide you with a Product Disclosure Statement. This contains information to help you understand the product being recommended.

At all times you are able to contact us and ask questions about our advice and the products we recommend.

You can provide instructions to us in writing, via phone or via email. In some cases, we may require you to provide signed instructions.

We may provide further advice to you to keep your plan up to date for changes in your circumstances, changes in the law and changes in the economy and products.

If we provide further advice it will be documented in a Record of Advice which we retain on file. You can request a copy of the RoA document at any time up to 7 years after the advice is provided.

Fees

All fees are payable to Port Phillip Financial Services.

Advice Preparation Fee

The Advice Preparation fee includes meeting with you, the time we take to determine our advice and the production of the SoA.

The Advice Preparation fee is based on the scope and complexity of advice provided to you. We will agree the fee with you before providing you with advice.

Advice Implementation Fee

If you decide to proceed with our advice, we may charge a fee for the time we spend assisting you with implementation. We will let you know what the fee will be in the SoA.

Annual Fees

Our annual service fees depend on the ongoing services that we provide to you. We will typically charge a fixed fee which is agreed with you in writing and paid monthly or quarterly. We may also charge a transaction fee on share trades.

Other Benefits

We may receive other benefits from product providers such as training, meals and entertainment. Details of any benefits received above \$100 will be maintained on a register which is available to you on request.

Adviser Remuneration

Angela is the owner of the practice and is remunerated through the profits that it makes.

Associated Business

We may refer you to Port Phillip Group for accounting, tax and business services. Port Phillip Group has common ownership with Port Phillip Financial Services.

Making a Complaint

We endeavour to provide you with the best advice and service at all times. If you are not satisfied with our services, then we encourage you to contact us. Please call us or put your complaint in writing to our office.

We aim to resolve complaints immediately. Where this is not possible, we will acknowledge the receipt of your complaint within 48 hours. We will then explain our process to resolve your complaint and tell you who will handle your complaint.

If you are not satisfied with our response after 30 days you can lodge your complaint with the Australian Financial Complaints Authority. You can contact AFCA on 1800 931 678 or via their website www.afca.org.au. AFCA provides fair and independent financial services complaint resolution which is free to consumers.

Your Privacy

We are committed to protecting your privacy.

We have a Privacy Policy which sets out how we collect, hold, use and disclose your personal information. It also sets out how you can access the information we hold about you, how to have it corrected and how to complain where you are not satisfied with how we have handled your personal information.

Our Privacy Policy is available on request and on our website.