

Financial Adviser Profile

Overview

Peter Adkins is a Certified Financial Planner® and has over 20 years of experience in providing financial planning advice. Peter works with clients at all life stages providing comprehensive, tailored and strategic advice on an ongoing basis. For the last 11 years, Peter has worked for Walker Wayland (NSW) Financial Services Pty Ltd.

Walker Wayland (NSW) Financial Services Pty Ltd was established on the 9th July 2001. Since that time the firm has served a wide range of clients providing individual advice and advice to clients in their role as trustees of Self-Managed Superannuation Funds, family trusts and directors of companies on a broad range of financial planning issues.

Peter Adkins is a Sub-Authorised Representative of Walker Wayland (NSW) Financial Services Pty Limited (t/a Walker Wayland (NSW) Financial Services), Corporate Authorised Representative No. 258381. Authorised Representative No. 252752.

Qualifications

Peter Adkins has a Diploma in Financial Planning (DipFP), is a Certified Financial Planner® (CFP®) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Peter Adkins is a member of the Financial Planning Association (FPA) and abides by their code of professional conduct and ethics.

Authorisations

Peter Adkins is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;
- Self-Managed Superannuation Funds;
- Securities; and
- Standard Margin Lending Facility.



Peter Adkins

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Advice Fees and Charges

Walker Wayland (NSW) Financial Services Pty Ltd / Peter Adkins will be paid financial planning fees as described in the Financial Services Guide.

Financial Plan

Research and preparation of a Financial Plan / Statement of Advice (SOA). The fee for the preparation of a Statement of Advice and other advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work. **The following is a guide to our fees.**

Financial Plan / Statement of Advice - fee for service: Between \$3,960 and \$13,200 including GST.

As an hourly rate, the fee for financial service is \$440 incl. GST. You will be notified of the time involved prior to the commencement of any work, if applicable.

Ongoing Advice & Advisory Service

You will be notified of the cost involved prior to the commencement of any ongoing service. The following is a guide to our service level and fee structure.

Gold level - Client Service Agreement. An annual agreement provides for ongoing advice and advisory services. This is a fixed fee in the range of \$3,960 and \$5,720 including GST. Generally, the service level is applicable for individuals.

Platinum level – Client Service Agreement. An annual agreement provides for ongoing advice and advisory services. This is a fixed fee starting from \$5,720 including GST. Generally, the service level is applicable for individuals who may also require advice or one or more related entities, such as SMSF, company or trust structures or individual(s) with significant investment portfolios.

Walker Wayland (NSW) Financial Services Pty Ltd pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Peter Adkins is a salaried employee of Walker Wayland (NSW) Financial Services Pty Ltd and will receive a salary & bonus from this company.

Other Benefits Peter Adkins May Receive

From time to time Peter Adkins may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

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