ABOUT YOUR ADVISER

Marcello Rogliano | Authorised Representative Number 1254165

Version number | 2.0

Business Name:

CCA Financial Planners

Corporate Representative Name:

Christopher Cachia & Associates Pty Ltd

Corporate Authorised Representative Number

243576

BUSINESS CONTACT DETAILS

Suite 19, Level 15, 401 Docklands Drive,

DOCKLANDS, VIC, 3008

Phone: 03 7037 9888

Mobile: 0425 807 112

Email: marcello@ccafp.com.au

Web: www.ccafp.com.au

CCA FP Wealth Pty Ltd (ABN 56 659 188 655 | AFSL 540 531) authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the CCA FP Wealth Pty Ltd Financial Services Guide (FSG).

ABOUT ME

I commenced my career as a financial adviser in 2017 and became an authorised representative of CCA FP Wealth Pty Ltd on 01/09/2022.

I hold the following qualifications:

- Bachelor of Business (Banking and Finance/International Trade)
- Diploma of Financial Planning
- Self Managed Superannuation Fund Adviser (Personal Advice)

I have met the following Financial Advisers Standards and Ethics Authority (FASEA) requirements:

- Education standard
- Passed the Financial Advisers Exam

I hold the following memberships:

- Financial Planning Association of Australia

I am authorised to provide the following financial services:

Superannuation and Retirement Planning
Personal Superannuation Pensions and Annuities Self-Managed Superannuation Centrelink / Veterans' Affairs Assistance
Wealth Creation and Investments
Deposit Products Investment Bonds Managed Investments Exchange Traded Products Listed Securities (Shares and other products) Gearing
Wealth Protection
Personal Insurance Business Insurance Insurance Claims Assistance
Other Financial Planning Services
Budgeting and Cashflow Management Debt Management Estate Planning Assistance

My remuneration

I am remunerated by:

- Salary and bonus

The following table summarises the types of fees or commissions that 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).

Remuneration Type	From	To
SoA Preparation	$2,795	$12,595
Hourly Rate	$440	
Remuneration Type	**Initial**	**Ongoing (pa)**
Implementation and Ongoing Adviser Service Fee	-	$3,900 to $14,580
Implementation and Ongoing Adviser Service Fee*	-	0% to 1.10%
Insurance Commission*	0% to 66%^	0% to 35%

*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.