

ABOUT YOUR ADVISER

Elton Rodrigues | Authorised Representative Number 1313645

Adviser Profile | 01/07/2025

CCA Financial Planning Pty Ltd trading as

CCA Financial Planners

Corporate Authorised Representative Number
1315863

BUSINESS CONTACT DETAILS

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CCAFP 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 CCAFP Wealth Pty Ltd Financial Services Guide (FSG).

About Me

I commenced my career as a Provisional Financial Adviser in 2024. I became an authorised representative of CCFP Wealth Pty Ltd on 28/01/2025.

I hold the following qualifications:

- Bachelor of Financial Planning
- Bachelor of Accounting

Authorisations

I am authorised in the following financial services and products:

- Superannuation
- Pensions and Annuities
- Cash and Term Deposits
- Managed Investments
- Listed Securities (shares and other products)
- Investment Bonds
- Life Insurance
- Centrelink/Veterans Affairs Assistance
- Aged Care
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary and bonus/dividends/distributions

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up to	
SoA Preparation Fee	\$30,000	
Implementation Fee	\$10,000	
Hourly Rate	\$440	
Insurance Claims Handling	\$30,000	
Remuneration	Initial	Per Annum
Adviser Service Fee	n/a	Up to \$30,000
Adviser Service Fee (asset based)*	n/a	Up 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 financial planning business and I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

We have the following referral fee arrangements in place:

Referral Parties

We may pay a referral fee of up to 20% of our upfront and ongoing fees to the following businesses:

- Bossio Financial Planning Pty Ltd
- Riverwood Group
- Greenview Nuture Plus Pty Ltd
- Key Accountants