

ABOUT YOUR ADVISER

Marcello Rogliano | Authorised Representative Number 1254165

Adviser Profile | 26/11/2025

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 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 Funds

I hold the following memberships:

- Financial Advice Association Australia (FAAA)

Authorisations

I am authorised in the following financial services and products:

- Superannuation
- Pensions and Annuities
- Self-Managed Superannuation Funds
- 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.