

# ABOUT YOUR ADVISER

**Stephen Perrett | Authorised Representative Number 1001744**

**Adviser Profile | 26/11/2025**

CCA Financial Planning Pty Ltd trading as

**CCA Financial Planners**

Corporate Authorised Representative Number  
1315863

## **BUSINESS CONTACT DETAILS**

Suite 19, Level 15, 401 Docklands Drive,  
DOCKLANDS VIC 3008

Phone: (03) 8651 6555

Mobile: 0422 316 326

Email: [steve@ccafp.com.au](mailto:steve@ccafp.com.au)

Web: [www.ccafp.com.au](http://www.ccafp.com.au)

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 have been in the financial services industry since 1995 and a financial planner for over 20 years.

I hold the following qualifications:

- Diploma of Financial Planning
- Certified Financial Planner
- Bachelor of Business

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 are 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.