

# Adviser Profile



**Leanne Brazel, DipFP**  
Wealth Planning Partners Pty Ltd 80 114 978 442

If you would like to make an appointment, please contact my office on:

<b>ADDRESS</b>	Suite 110, Level 1, Eastside Building, 232 Robina Town Centre Drive, ROBINA QLD 4226
<b>TELEPHONE</b>	(07) 5593 0855
<b>FAX</b>	(07) 5593 1922
<b>EMAIL</b>	leanne@wealthplanningpartners.com.au

The Adviser Profile forms an essential part of the Financial Services Guide ("Guide"). The Guide is not complete without it.

**Authorised Representative Number:** 456984  
**Corporate Authorised Representative Number:** 290999  
**Issued:** 20/03/2015  
**Version:** 1.2

Wealth Planning Partners Pty Ltd (Practice) is a Corporate Authorised Representative of Financial Services Partners Pty Limited (AFSL No. 237590 ABN 15 089 512 587). (Financial Services Partners)

Leanne Brazel is an Authorised Representative of Financial Services Partners.

Having worked in an administrative role at Wealth Planning Partners for some years, Leanne was presented with the opportunity of further study within the finance industry and embraced the opportunity to learn more.

Leanne's vision is to offer a wider range of services to our existing clients and bring new clients in to the practice. Her experience within the business means she understands the challenges faced by our clients and the role that good planning can play in finding success.

Leanne is committed to continuously learning and helping Wealth Planning Partners' clients with their needs. From dealing with individual clients on a daily basis she has seen the difference a good plan can make and the need to assist others in achieving their financial goals.

## AREAS OF ADVICE

Leanne is authorised to provide services covering advice and dealing in financial products in the specialised areas listed below:

- Life Risk Insurance Products
- Risk Insurance within Superannuation
- Deposit and Payment Products
- Interests in Managed Investment Schemes
- Superannuation
- Retirement Saving Accounts
- Approved Deposit Funds
- Traditional Annuities and Pensions
- Market-linked Annuities and Pensions
- Investment Life Insurance Products

## Financial Services Partners Pty Ltd

Level 23, 242 Pitt Street, Sydney, NSW 2000, Australia

AFSL No. 237590 ABN 15 089 512 587

T 1800 006 216

W [www.fspadvice.com.au](http://www.fspadvice.com.au)

*Wealth Planning*  
PARTNERS

### REMUNERATION

I may be remunerated by one or more of the following methods outlined in this document. If any remuneration I receive relates to the advice I have provided to you, then further details will be set out in your Advice Document.

#### **Fee for service**

If you pay a fee for service Financial Services Partners, they will pay between 90% and 100% of these fees to the Practice as detailed in The Guide under the heading 'How we are paid'. I will disclose, at the time I provide you advice, the amounts that Financial Services Partners, the Practice and I may each receive as a result of providing a financial service to you.

#### **Remuneration from product and service providers**

Financial Services Partners may receive remuneration from product and service providers who in turn may pay a proportion of this to Practices as detailed in the Guide under the heading 'How we are paid'. I will disclose, at the time I provide you advice, the amounts that Financial Services Partners, the Practice and I may each receive (if any) as a result of providing a financial service to you.

#### **Salary**

I am/may be paid a salary based on experience and capability.

#### **Bonus**

I may be eligible to receive a bonus, based on a combination of revenue and other non-financial measures that relate to compliance, staff training and the quality of service.

#### **Other benefits**

I may also receive other benefits, all of which are detailed in the Guide under the heading "What else you need to know".

### CLIENT FEES

There are various ways that you may pay for the services that are provided. They are:

#### **Fee for Service**

A fee may be payable for the following services:

- preparation of advice
- implementation of advice
- ongoing review and advice services.

The fee for service may be determined by any of the following.

1. An hourly rate that is agreed depending on the nature and complexity of your circumstances.
2. A fixed fee that we agree with you before we commence work.
3. A percentage of funds under advice (excluding borrowed funds) depending on the complexity of your circumstances.
4. A combination of any of the above.

#### **Remuneration from a product or service provider**

As outlined above, at the time I provide you with advice I will disclose any remuneration that Financial Services Partners, the Practice and I may each receive from product and service providers as a result of providing a financial service to you.

#### **A combination of Fee for Service and Remuneration from a Product or Service Provider**

A combination of fee for service and remuneration from a product or service provider may be payable. This will be disclosed to you at the time I provide you with advice.

I will obtain your agreement to the arrangement prior to proceeding.