ABOUT YOUR ADVISER

Daniel Morcombe Authorised Representative Number 311943

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Omnis Financial Planning ATF The OFP Unit Trust

Corporate Authorised Representative Number 1006949

BUSINESS CONTACT DETAILS

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O & I Wealth ABN 54 656 530 513 AFSL 538367 Authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the O & I Wealth Pty Ltd Financial Services Guide (FSG).

ABOUT ME

I commenced my career as a financial adviser in 2002 and became an authorised representative of O & I Wealth Pty Ltd on 16/5/2022.

I hold the following qualifications:

- Bachelor Of Science (BSc) UWA
- Certified Financial Planner (CFP) FPA

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

- Passed the Ethics Exam
- Passed the Financial Advisers Exam

I hold the following memberships:

- Financial Planning Association (FPA)

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 Aged Care
Wealth Creation and Investments
Deposit Products Investment Bonds Managed Investments Exchange Traded Products Listed Securities (Shares and other products)
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
- Share of Profits and /or 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
Implementation Fee	$0	$10,000
SoA Preparation Fee	$0	$22,000
Hourly Rate	$220	
Remuneration Type	**Initial**	**Ongoing (pa)**
Adviser Service Fee	$0 to $22,000	$0 to $22000
Adviser Service Fee*	0% to 3%	0% to 3%
Contribution Fee*	0% to 11%	0% to 11%
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.

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.