About Your Adviser

Stephen Nielsen

Authorised Representative No. 326239

Ascent Wealth Management Pty Ltd

Authorised Representative No. 326238

Business Contact Details

Room 3, Corporate House, Building 6, Garden City Office Park,
2404 Logan Road
Eight Mile Plains QLD 4113

PO Box 6493
Upper Mount Gravatt QLD 4122

Phone 0733439228
Mobile 0417292002
Email steve@ascentwm.com.au
Web www.ascentwm.com.au

About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 1995 and became an authorised representative of Alliance Wealth Pty Ltd on 02 February 2021.

I have over thirty four years experience in the financial services industry. Over the last twenty six years in financial planning both as a financial planner and also running the management and development of Financial Planners and other holders of letters of authority in geographic teams.

I have met the FASEA Education Standard and I hold the following qualifications:

- Master of Business Administration
- Graduate Certificate in Business Administration (Executive Business Operations)
- Margin Lending Course
- Fellow Chartered Financial Practitioner Program
- SMSF Specialist Adviser Accreditation Program
- Accredited Listed Product Adviser Program
- Ethics and Professionalism in Financial Advice Course
- Graduate Diploma of Financial Planning

I hold the following memberships:

- Fellow of the FINSIA
- Fellow Chartered Financial Practitioner Member of the Financial Adviser's Association of Australia (FAAA)
- SMSF Specialist Advisor of the SMSF Association

I am authorised to provide the following financial services:

Superannuation and Retirement Planning
Personal Superannuation Corporate Superannuation Industry and Public Sector Superannuation Pensions and Annuities Self-Managed Superannuation Centrelink / Veterans' Affairs Assistance

Wealth Creation and Investments
Cash and Term Deposits Investment Bonds Managed Investments Exchange Traded Products Listed Securities (Shares and other products) Margin Lending Gearing

Wealth Protection
Term Life Insurance Total and Permanent Disability (TPD) Insurance Trauma Insurance Income Protection Insurance Business Insurance Insurance Claims Assistance

Other Financial Planning Services
Budgeting and Cashflow Management Debt Management

My Remuneration

I am remunerated by:

- Salary plus profit share

The following table summarises the types of fees or commissions that are 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).

Type of Remuneration	From	To
Implementation Fee	$380	$10,000
SoA Preparation Fee	$760	$10,000
Hourly Rate	$380	

Type of Remuneration	Initial	Per Annum
Adviser Service Fee	$2,660 to $11,400	$2,660 to $11,400
Insurance Commission*	0% to 66%^	0% to 31.13%

* 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.

Benefits, Interests and Associations

The Business, associated entities or 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.