ABOUT YOUR ADVISER

Darrin Newport
Authorised Representative Number 404149
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Newport Financial Group Pty Ltd

Corporate Authorised Representative

Corporate Authorised Representative
Number 404150

BUSINESS CONTACT DETAILS

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Peritia Wealth (ABN 19 640 803 827 | AFSL 523970) authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the Peritia Wealth Financial Services Guide (FSG).

ABOUT ME

I commenced my career as a financial adviser in 2002 and became an authorised representative of Peritia Wealth on 6th November 2020.

I hold the following qualifications:

- Master of Financial Planning (2021)
- Certified Financial Planner CFP® (2004)
- Diploma of Financial Markets (2002)
- Diploma of Financial Planning (2002)

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

- Education standard
- Passed the Financial Advisers Exam (2019)

I hold the following memberships:

- Financial Advice Association Australia

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
Cash and Term Deposits
Investment Bonds
Managed Investments
Exchange Traded Products
Listed Securities (Shares and other products)
Gearing
Wealth Protection
Personal Insurance
Business Insurance
Other Financial Planning Services
Budgeting and Cashflow Management
Debt Management
Estate Planning Assistance

My remuneration

I am remunerated by:

- Salary & 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
SoA Preparation Fee	$3,300	$11,000
Implementation Fee	0.00%	1.00%
Hourly Rate	$440	
Remuneration Type	**Initial**	**Ongoing (pa)**
Adviser Service Fee	$3,300 to $11,000	$3,300 to $15,000
Adviser Service Fee*	0% to 1%	0% to 0.44%
Contribution Fee*	0% to 0%	0% to 0%
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.

Benefits, interests and associations

The financial planning business and I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Related Parties
Peritia Wealth Pty Ltd
Related Parties
Newport Finance Brokers Pty Ltd
Referral Parties
Newport Accounting Services
Shareholdings
Chevron Leopard Pty Ltd (Discretionary Trust)