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PURSUIT PRIVATE WEALTH

Helping You.

Pursuit Private Wealth

Representative Profile - Version 4.0
Preparation Date 8 July 2020

This document forms the second part of the Oreana Financial Services Guide. This FSG is divided into two parts and both parts must be read together. This document is designed to clarify who we are, what we do, and aims to help you decide whether to use our services.

Who we are

Your Financial Advisors are Representatives of and offer services on behalf of Oreana Financial Services Pty Ltd, AFSL License No. 482234:

Cameron Whyte Authorised Representative No. 337874

Jamie Klason Authorised Representative No. 338320

Aaron Kittelty Authorised Representative No. 1270790

The Financial Services that the above financial advisors offer are provided by Pursuit Private Wealth, ABN 65 166 506 967 trading as Pursuit Private Wealth, Authorised Representative (AR) No. 458748.



Cameron Whyte

Certified Financial Planner (CFP®)
Bachelor of Commerce / Diploma
of Financial Planning

Jamie Klason

Financial Planner and Risk
Specialist
Advanced Diploma of Financial
Planning

Aaron Kittelty

Bachelor of Business
(Accountancy) / Advanced
Diploma of Financial Planning

Cameron has over 20 years' experience in the Finance Industry having worked in Accounting and Financial Planning businesses during this time.

Jamie has over 15 years' experience in the Finance Industry having worked in Banking, Accounting and Financial Planning businesses during this time.

Aaron has worked in both Accounting and Financial Planning positions and has significant experience with Self-Managed Superannuation compliance matters.

Cameron and Jamie established Pursuit Financial Advisers in June 2009 and more recently established the Private Wealth division (Pursuit Private Wealth) in April 2017.

Pursuit Private Wealth specialise in providing advice to Executives, Professionals, Business Owners and Retirees. Our range of services and advice are designed to enhance your financial wellbeing and assist with managing your financial complexity, allowing you to focus on your business, family and/or retirement needs. Oreana has authorised your advisors to provide you with this Financial Services Guide.

Our Team

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Behind Cameron, Jamie and Aaron is a well credentialed and experienced team that are dedicated to delivering exceptional client service.



Mietta Bouchier
HR Manager & Client
Relations Executive



Melissa Kaczmariski
Client Relations Executive



Jacalyn Van Puyenbroek
Client Relations Executive

What we do

We are authorised by Oreana Financial Services to provide financial advice in relation to:

- Wealth Accumulation
- Income & Asset Protection
- Tax Strategies
- Superannuation (Inc. SMSFs)
- Retirement & Redundancy Planning
- Estate Planning
- Government Benefits
- Debt Management
- Margin Lending
- Expatriate Financial Planning

What financial products and services are we authorised to provide?

We are authorised to provide personal financial advice, general financial advice, and transact on your behalf (dealing) in relation to the following types of financial products:

- Basic / Non-Basic Deposit Products
- Debentures, stocks, or bonds issued or proposed to be issued by a government;
- Life products - Investment Life Insurance
- Life products – Life Risk Insurance
- Managed investment schemes, including Investor Directed Portfolio Services (IDPS)
- Retirement savings accounts (“RSA”) products
- Securities; and
- Superannuation;
- Standard Margin Lending
- Derivatives;
- Foreign exchange contracts;

How we charge for our services

All fees and commissions are inclusive of GST and the fees could be greater than those disclosed below in complex cases. In these instances, we will inform you of the exact fee payable promptly in writing.

Schedule of fees

Type of advice	Fee Charged
Initial consultation	At our expense
Initial advice <i>(advice preparation and implementation)</i>	<p>Our initial advice fee will range from \$1,000 - \$5,000 depending on the level of complexity of your situation and the advice provided.</p> <p>Complex advice requirements include the use of trusts and ownership structures, overseas assets or incomes, executive options and share schemes or multiple investment entities.</p> <p>This fee will be invoiced directly to you upon the completion of our written advice.</p>
Ongoing advice	<p>Our ongoing advice fee will range from a minimum of \$10,000 up to \$20,000 per annum. This fee will be determined by the complexity of the ongoing advice required.</p> <p>Complex advice requirements include the use of trusts and ownership structures, overseas assets or incomes, executive options and share schemes or multiple investment entities.</p> <p>This fee will be paid via direct debit from your nominated bank account on a monthly basis.</p>
Ad hoc advice	We do not offer Ad hoc advice.
Insurance products	We will receive commission for our initial and ongoing services to you. Initial commission is between 0% and 66% and the ongoing commission is between 0% and 30% of the annual premium and is paid by the insurance product issuer to us.

How we are paid

As directors of Pursuit Private Wealth, Cameron Whyte and Jamie Klason are entitled to receive director fees or distributions from Pursuit Private Wealth. They do not receive any bonuses, benefits, or additional payments for recommending specific products or providers and the remuneration scheme of which they are a part of has been designed to ensure that your interests are prioritised, conflicts are minimised and that their advice is not inappropriately influenced.

Aaron Kittelty receives a salary as an employee of Pursuit Private Wealth. He may also receive a performance bonus based on criteria including the quality of his advice, his compliance with his ethical and professional obligation, client retention rates and his contribution to the financial performance of Pursuit Private Wealth. He does not receive any bonuses, benefits, or additional payments for recommending specific products or providers and the remuneration scheme of which he is a part of has been designed to ensure that your interests are prioritised, conflicts are minimised and that his advice is not inappropriately influenced.

Payment of Fees

All fees and commissions disclosed in this FSG are paid to Oreana, who pays all fees and commissions it receives to Pursuit Private Wealth.

For more information on anything you have read in this document or if there is anything else we can help you with, please contact us at:

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www.pursuitprivatewealth.com.au

