

# Representative Profile

Super Advice Corporate Services Pty Ltd

Corporate Authorised Representative of Gallagher Benefit Services Pty Ltd

Version 1.2, Issued 16 April 2019

This profile is part of the Financial Services Guide (FSG) and is only complete when the FSG is attached.

## Adam Gilbert

Adam Gilbert, is a representative of Gallagher Benefit Services Pty Ltd.

Phone: 1300 557 782

Email: Adam\_Gilbert@ajg.com.au



## Education and qualifications

- Bachelor of Arts (Journalism)
- Diploma of Financial Planning

## Experience

Adam has extensive experience in client services, including his last role at Crystal Palace Football Club. He has also worked in Social Media Management and has written for a number of websites and online publications. Adam has over 2 years' experience in the financial services industry.

## Roles and responsibilities

Adam is key in maintaining relationships with clients whilst fielding a broad range of client queries.

Adam is committed to providing an outstanding service day-in, day-out.

Key responsibilities include:

- Attending to client queries and requests
- Assisting Key Account Managers with their corporate clients
- Helping employers process contributions
- Assisting members with lost super and consolidation
- Delivering member education programs and general financial advice to employees

## Advice Adam can provide

Adam is authorised to provide general advice and deal in the following financial products:

- Superannuation
- Life risk insurance products

## Service fees

We are committed to providing you with comprehensive service and advice to ensure that you meet your stated objectives.

Additional services are obtainable on request and you will be advised of any associated costs before our services are provided. Additional services are charged at the following hourly rates:

- \$330 per hour for a financial planner.
- \$220 per hour for an associate financial planner and / or paraplanner.
- \$110 per hour for administrative support.

Please refer to the Financial Services Guide for a detailed explanation of other fees that may be payable for any financial advice provided to you.

## How Adam is paid

Super Advice Corporate Services Pty Ltd is owned by Gallagher Benefit Services Pty Ltd. Gallagher Benefit Services Pty Ltd will retain 100% of the gross revenue received for the recommended financial services and/or products. Adam is a salaried employee and may be eligible to receive a performance bonus.

## Appendix: Privacy Collection Statement

As part of the financial planning process, we need to collect information about you. Where possible we will obtain that information directly from you, but if authorised by you we may also obtain it from other sources such as your employer or accountant. If that information is incomplete or inaccurate, this could affect our ability to fully or properly analyse your needs, objectives and financial situation, so our recommendations may not be completely appropriate or suitable for you.

We are also required under the *Anti-Money-Laundering and Counter-Terrorism Financing Act (AML/CTF) 2006* to implement client identification processes. We will need you to present identification documents such as passports and driver's licences in order to meet our obligations.

We keep your personal information confidential, and only use it in accordance with our Privacy Policy. Some of the ways we may use this information are set out below:

- The representative and our staff may have access to this information when providing financial advice or services to you;
- The representative and our staff may, in the future, disclose information to other financial advisers and brokers to review customers' needs and circumstances from time to time, including other companies within the Arthur J. Gallagher Group;
- Your information may be disclosed to external service suppliers both here and overseas who supply administrative, financial or other services to assist the representative and the Arthur J. Gallagher Group in providing financial advice and services to you;
- Your information may be used to provide ongoing information about opportunities that may be useful or relevant to your financial needs through direct marketing (subject to your ability to opt-out as set out in the Privacy Policy);
- Your information may be disclosed as required or authorised by law and to anyone authorised by you.

Your adviser will continue to take reasonable steps to protect your information from misuse, loss, and unauthorised access, modification or improper disclosure. You can request access to the information the Licensee holds about you at any time to correct or update it as set out in the Privacy Policy. The Privacy Policy also contains information about how to make a complaint about a breach of the Australian Privacy Principles. For a copy of the Privacy Policy please contact us.

## Our contact details

### Super Advice Corporate Services Pty Ltd

ABN: 89 064 182 556  
CAR: 245602  
Street Address: Level 12, 80 Pacific Highway  
North Sydney NSW 2060  
Postal Address: PO Box 1898, North Sydney NSW 2060  
Phone: 1300 557 782  
Email: [super-service@ajg.com.au](mailto:super-service@ajg.com.au)  
Website: [gallagherbenefits.com.au](http://gallagherbenefits.com.au)

### Gallagher Benefit Services Pty Ltd

ABN: 49 611 343 803  
AFSL: 488001  
Address: Level 12, 80 Pacific Highway  
North Sydney NSW 2060  
Phone: 1300 850 757  
Email: [GBSAU\\_admin@ajg.com.au](mailto:GBSAU_admin@ajg.com.au)  
Website: [gallagherbenefits.com.au](http://gallagherbenefits.com.au)

## Changes to this Representative Profile

Information in this document may change from time to time. We may make such changes by amending the Representative Profile and publishing an updated version on our website. You may also obtain a printed copy of the updated information by calling 1300 557 782.

Adam Gilbert  
Representative Profile Version 1.2, Issued 16 April 2019