Adviser Profile

Simon Milton

Authorised Representative No. 430360

KDM Financial and Estate Planning Pty Ltd t/a Assurance Planning

Corporate Authorised Representative No. 425536

Your adviser

Simon Milton

Contact details

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Profile

KDM Financial and Estate Planning Pty Ltd t/a Assurance Planning specialises in Risk Insurance strategies and portfolios for businesses and individuals.

Simon Milton has been individually authorised (Representative Number 430360) to provide financial product advice and deal in all of the below mentioned categories as a contractor for KDM Financial and Estate Planning Pty on behalf of Aon Hewitt Financial Advice Limited.

Experience

Simon has been a financial advisor since 2003 and has worked closely with business and individual clients helping them with their risk insurance needs and planning.

Qualifications and certifications

Advanced Diploma of Financial Planning

Diploma of Financial Services (Financial Planning)

Professional memberships

AFA (Association of Financial Advisers)

Authorisations

Australian Financial Services License

Simon is authorised to provide financial product advice and deal in the following:

i. deposit and payment products limited to:

a. basic deposit products;

b. deposit products other than basic deposit products;

ii. life products including:

a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and

b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;

iii. securities;

iv. interest in managed investment schemes including investor directed portfolio services;

v. retirement savings accounts (“RSA”) products (within the meaning of the Retirement Savings Account Act 1997);

vi. superannuation.

Fees and charges

Initial consultation

Free of charge

Advice preparation

Completion of needs analysis: Free
Advice preparation: $749.00 - $2,449.00
The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required. Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

Implementation

Up to 2.00% for up to $100,000
Up to 1.50% from $100,001 to $250,000
Up to 1.00% for any amount over $250,001

This fee may be paid by cheque or deducted from any investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review service

A minimum ongoing adviser service fee will be calculated as a percentage of your total portfolio to a maximum of 2.00%.

Consulting fees

$220.00 per hour
For any other service you require that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Simon Milton is a contractor of KDM Financial and Estate Planning Pty Ltd t/a Assurance Planning and will receive remuneration payable of up to 110% on the product sales.

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.