

# Financial Service Guide

Version: 3 May 2022

## Part Two

This document is part two of the Financial Services Guide (FSG) dated 3 May 2022 and should be read in conjunction with part one of our FSG dated 3 May 2022.

### Licensee:

Brela Group Pty Ltd (AFSL 512840)

ABN 80 629 633 898

AFSL Number 512840

Suite 704, 53 Walker St

North Sydney NSW 2060

Phone: 02 9121 4545

This Financial Services Guide (FSG) has been prepared and authorised for distribution by Brela Group.

### Contact Details

Suite 704, 53 Walker St

North Sydney NSW 2060

[Website: www.wealthpeak.com.au](http://www.wealthpeak.com.au)

Phone: 02 9121 4545

### Authorised Representatives:

**Andrew Ofori Akuoko** (ASIC# 1248814)

The Authorised Representative acts on behalf of Brela Group who is responsible for the services that they provide.

### Adviser Remuneration

Andrew is a shareholder of Wealth Peak Financial Advice Pty Ltd and receives a share of the profits generated by the practice.

### Conflicts of Interest

Andrew and Wealth Peak may recommend investments in shares that they or their associated parties may hold or may hold in the future. They will not however recommend investments in entities in which they or their associated parties are Significant Shareholders.

### Our Services

Andrew is authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities
- Margin lending facilities
- Deposit and payment products
- Life products
- Government debentures, stocks and bond

### Andrew's Education, Qualifications and Experience

- Master of Commerce (Financial Planning)
- Advanced Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Financial Planning)
- Margin Lending qualification
- SMSF qualifications
- Over 18 years of experience in the provision of Wealth Management advice

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### Authorised Representatives:

**Ian Satill** (ASIC# 239483)

The Authorised Representative acts on behalf of Brela Group who is responsible for the services that they provide.

### Adviser Remuneration

Ian is a shareholder of the Wealth Peak Financial Advice Pty Ltd and receives a share of the profits generated by the practice.

### Conflicts of Interest

Ian and Wealth Peak may recommend investments in shares that they or their associated parties may hold or may hold in the future. They will not however recommend investments in entities in which they or their associated parties are Significant Shareholders.

### Our Services

Ian is authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities
- Margin lending facilities
- Deposit and payment products
- Life products
- Government debentures, stocks and bond

### Ian's Education, Qualifications and Experience

- Diploma of Financial Services (Financial Planning)
- Over 40 years of experience in providing financial advice

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Phone: 02 9121 4545

### Authorised Representatives:

**Debra Blackah** (ASIC# 224954)

The Authorised Representative acts on behalf of Brela Group who is responsible for the services that they provide.

### Adviser Remuneration

Debra is a shareholder of Wealth Peak Oxley Pty Ltd and receives a share of the profits generated by the practice.

### Associated Businesses

Debra is a director of Wealth Peak Oxley Pty Ltd and receives a profit distribution only via her related Chartered Accounting Practice Oxley Partners Pty Ltd.

### Conflicts of Interest

Debra and Wealth Peak Oxley may recommend investments in shares that they or their associated parties may hold or may hold in the future. They will not however recommend investments in entities in which they or their associated parties are Significant Shareholders.

### Our services

Debra is authorised to provide personal advice and dealing services in the following areas:

- Deposit and payment products
- Life products
- Government debentures, stocks and bond
- Life products
- Managed investment schemes
- Retirement Savings Accounts
- Securities
- Margin lending, and
- Superannuation

### Debra's Education, Qualifications and Experience

- Bachelor of Business from the University of Technology (Sydney)
- Over 38 years of experience in the provision of accounting advice and 16 years of experience in the provision of Financial Advice
- Specialist accreditation to provide advice on Aged Care and Self-Managed Superannuation

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Phone: 02 9121 4545

### Authorised Representatives:

**David Paul Rundle** (ASIC# 231901)

The Authorised Representative acts on behalf of Brela Group who is responsible for the services that they provide.

### Adviser Remuneration

David is a shareholder of the Wealth Peak Achieve Pty Ltd and receives a share of the profits generated by the practice.

### Associated Businesses

Achieve Financial Services Pty Ltd and Wealth Peak Achieve are associated businesses with David being a common director and shareholder.

### Conflicts of Interest

David and Wealth Peak Achieve may recommend investments in shares that they or their associated parties may hold or may hold in the future. They will not however recommend investments in entities in which they or their associated parties are Significant Shareholders.

### Our services

David is authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities
- Margin lending facilities
- Deposit and payment products
- Life products
- Government debentures, stocks and bond

### David's Education, Qualifications and Experience

- Bachelor of Commerce from the University of Newcastle
- Over 20 years of experience in the provision of accounting advice and 15 years of experience in the provision of Financial Advice
- Registered Tax Agent.