

# Financial Services Guide Part 2

Version Number 1.0

## Part Two - Adviser Profile

This adviser profile is Part Two of the Rockton Pty Ltd Financial Services Guide (FSG) dated **27<sup>th</sup> June 2024** and should be read in conjunction with Part One of our FSG dated **25<sup>th</sup> August 2021**. Together these documents form the complete FSG.

The individual(s) listed in this FSG are authorised by Rockton Pty Ltd to provide personal advice through Centrewest Financial Services Pty Ltd.

## Authorised Representative Profile

### Corporate Authorised Representative - Profile

Authorised Representative Name	Centrewest Financial Services Pty Ltd
Authorised Representative Number	390349
Business Address	Level 2, 226 Balcatta Road, Balcatta WA 6021
Postal Address	PO Box 636, Balcatta WA 6914
Phone	08 9349 7900
Email	<a href="mailto:wayne@centrewest.com.au">wayne@centrewest.com.au</a>
Website	<a href="http://www.centrewest.com.au">www.centrewest.com.au</a>

*Centrewest Financial Services Pty Ltd is a corporate authorised representative of Rockton Pty Ltd.*

### Authorised Representative - Profile

Authorised Representative Name	Wayne Nash
Authorised Representative Number	303749
Mobile	0402 786 080
Email	<a href="mailto:wayne@centrewest.com.au">wayne@centrewest.com.au</a>

*Wayne Nash is a sub-authorised representative of Centrewest Financial Services Pty Ltd.*



### Authorised Representative Background

My name is Wayne Nash and I have been working in the financial services industry since 2006. Prior to this, I worked in small to medium sized businesses as an Accountant.

### Professional Memberships

Financial Advice Association Australia

### Qualifications

GradDip.FP, AdDip.FP, Dip.FP, Dip.BS

### Why Should You Choose Me

I aim to provide personalised and responsible advice suited to your objectives and believe that sound advice and planning is the key to improving your financial position.

I undertake continuous professional development and training programs so that I am up to date with legislative changes to superannuation, investments, social security and tax environments.

I have access to technical, risk and investment research professionals who provide me with additional analysis on strategies and products that become available as a result of these changes.

I will help you sort out your goals and weigh up different investment strategies to achieve them. Most importantly, I turn your thoughts into action. There are no secret formulas to achieving financial security. I work with you to get the basics right and ensure you have a plan to achieve your goals over time.

### **Advice I can Provide**

I can provide you with strategic advice as well as arrange the types of financial products listed below. I can help you to identify the types of services and products that will be appropriate to meet your financial goals. In addition, you can choose whether to receive advice about a range of needs all at once, or we can provide advice about a single issue, so your most important goals are achieved first. Further advice can then be provided over time about any other needs or goals as required.

I am authorised to provide advice on the products listed below:

#### **Strategies**

- personal insurance planning
- business insurance planning
- estate planning considerations

#### **Financial Services Products**

- life risk insurance products

**How to Contact Me** [wayne@centrewest.com.au](mailto:wayne@centrewest.com.au) or **0402 786 080**

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#### **Advice Fees**

The fees charged for our advice and services may be based on:  
A percentage-based fee that is agreed between you and us and paid via your product (if possible).

#### **Life insurance (1<sup>st</sup> year only)**

This commission is payable by the insurance company and is a percentage of the insurer's base premium i.e., premium excluding stamp duty, fire services levy, GST, model loadings or any other government charges, taxes, fees, or levies.

For insurance approved from 1 Jan 2020 onwards, the insurance commission can vary from 0% up to 66%. Example: if the annual premium were \$1,000 Rockton would receive up to \$660 in the first year based on the maximum.

#### **Life Insurance Commission (Year 2 onwards)**

Rockton may also receive a renewal commission from the insurance company each year while your policy is in force. This is a percentage of the base annual premium you pay and can vary from 0% up to 33%.  
Example: if your annual premium is \$1,000 Rockton would receive up to \$330 per annum based on the maximum.

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