

Financial Services Guide - Part B

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17 September 2024

RJS Wealth Management (RJSWM) Pty Ltd

ABN 24 156 207 126 is a corporate authorised representative (No. 438158) of Modoras Pty Ltd ABN 82 068 034 908 Australian Financial Services and Credit License No. 233209.

Trevor Scutt

Authorised representative profile

This document should be read together with Part A of the RJS Wealth Management Pty Ltd Financial Services and Credit Guide (FSCG). Modoras Pty Ltd (the licensee), has authorised the distribution of the FSG.

Your planner: Trevor Scutt

Your planner, Trevor Scutt, is authorised by RJS Wealth Management (RJSWM) Pty Ltd to provide financial planning advice on RJSWM's behalf

Trevor's authorised representative number 298289.

Qualifications, memberships, and experience

Trevor's qualifications, memberships and experience are as follows:

- Master of Financial Planning
- Certificate IV in Finance & Mortgage Broking
- Graduate Certificate in Self-Managed Superannuation Funds
- Ethics and Professionalism in Financial Advice
- Tier 1 Margin Lending: Personal Advice
- Member of the Association of Financial Planners
- Over 17 years of experience in financial services, including senior advisory roles

Financial product advice offered by Trevor

Trevor is authorised by RJSWM to deal in the following products:

- deposits and payments
- personal insurance and life investments
- superannuation (all)
- managed investments (e.g. investor-directed portfolio services)
- retirement savings accounts
- securities (e.g. shares)
- margin lending
- government debentures, stocks or bonds

Additionally, Trevor is registered to provide Tax (Financial) Advice services. Based on the information collected from you, Trevor will consider the tax consequences of the financial advice he provides. However, this financial advice will not include a full assessment of your overall tax position or your tax liabilities and obligations. You should seek specialist tax advice from your accountant.

Specialist advice areas

Trevor's specialist advice areas include:

- self-managed super funds
- leveraged investments
- direct equities

If Trevor identifies any other specialist areas of advice or products he believes you need but which he's not authorised to provide or recommend, he'll advise you to consult someone who is authorised.

For example, Trevor is not a credit representative of Modoras Pty Ltd, so cannot provide you with credit assistance. However, if you need credit assistance, he can refer you to one of the Modoras's credit representatives.

Who is Trevor associated with?

Trevor is associated with RJSWM as an authorised representative.

How is Trevor remunerated?

Trevor is an employee of RJSWM. Trevor may also receive a bonus based on a balanced scorecard arrangement.

His performance and that of RJSWM, is not based on or linked to dealings with any specific financial product or class of financial products.

RJSWM is entitled to receive 80% of the net total initial and ongoing fees or commissions payable to the licensee, Modoras Pty Ltd, for financial planning business written or advice provided by Trevor.

Details of any fees or commissions payable will be disclosed in the statement of advice or record of advice.

How to contact Trevor

Trevor can be contacted in the following ways:

trevor.scutt@rjswm.com.au

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