Financial Service Guide

Version: 1 July 2021

Part Two

This document is part two of the Financial Services Guide (FSG) dated 1 July 2021 and should be read in conjunction with part one of our FSG dated 1 July 2021.

Licensee:

Brela Group Pty Ltd (AFSL 512840)

This Financial Services Guide (FSG) is 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 the practice 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
- 17 years of experience in the provision of Wealth Management advice

Financial Service Guide

Version: 1 July 2021

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 practice 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.

Financial Service Guide

Version: 1 July 2021

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 practice 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)
- 41 years of experience in providing financial advice

Financial Service Guide

Version: 1 July 2021

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 the practice 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