

FINANCIAL SERVICES GUIDE

Part Two – Authorised Representative Profile

Version 1 – 2nd March 2020

This document has two parts being the 'Licensee Profile' and the 'Authorised Representative Profile'. Both parts should be read in conjunction so that you, our client, have a full understanding of the services being offered.

Who is my financial adviser?

Your financial adviser is – Denver Jansz

Address: Level 1, Suite 16, 181 Bay St., Brighton VIC 3186

Telephone: 0407 338 339

Email: denver@apollonias.com.au

Web: www.apollonias.com.au

Denver Jansz is a director of Apollonias Wealth Management Pty Ltd, a Corporate Authorised Representative of Nextplan. Denver Jansz's ASIC representative number is 001 235 963. Apollonias Wealth Management Pty Ltd's ASIC representative number is 001 263 632.

What experience does my adviser have?

As the founder of Apollonias Wealth Management, Denver has over 35 years' experience in the Financial Services Industry. Denver prides himself on understanding his clients' financial situation and putting their needs first. He provides clear, easy to understand strategic advice and gains the greatest pleasure in seeing his clients' financial situation improve. Denver has direct involvement in his clients' welfare and development. He is committed in helping them set and achieve their goals.

Denver holds a Graduate Certificate of Management and a Diploma of Management from Deakin University. Denver also has Diploma of Financial Planning from the Financial Planning Association of Australia which he also a member since year 2000.

Who is responsible for the financial services provided?

Nextplan is responsible for the financial services provided by Denver Jansz and Apollonias Wealth Management within the scope of the authority described in this FSG and for the distribution of this FSG.

What kinds of financial services are you authorised to provide to me and what kinds of financial products do these services relate to?

Denver Jansz is authorised by Nextplan to provide financial services in:

- Deposit and payment products limited to Basic deposit products and Deposit products other than basic deposit products
- Debentures, stocks or bonds issued or proposed to be issued by a government;
- Life products including Investment life insurance products and Life risk insurance products
- Interests in managed investment schemes including investor directed portfolio services
- Retirement savings accounts products
- Securities including Direct Equities
- Superannuation

Please note that Denver Jansz is not authorised to provide any services on behalf of Nextplan except in relation to the financial products listed above. The “What services and products are not provided by or on behalf of Nextplan” section earlier in this FSG gives examples of other services that are not provided on behalf of Nextplan.

Denver Jansz also provides an ongoing review service. As part of this service, Denver Jansz will conduct a review of your personal situation and their previous advice and recommend changes where they are needed.

How is my Adviser paid for services provided to me?

This FSG has previously outlined the source, method and amount of remuneration and other benefits payable to your adviser for the services provided to you.

Nextplan will collect all commissions, fees and other benefits in connection with financial services provided by Denver Jansz or Apollonias Wealth Management Pty Ltd. Nextplan will retain 5% of all income collected and will pass on the balance to Denver Jansz.

Denver Jansz is then paid a salary by his employer, Apollonias Wealth Management Pty Ltd. Denver Jansz may also receive profit share or a performance bonus, which may be based on the funds invested by clients of Apollonias Wealth Management Pty Ltd. Otherwise, Denver Jansz may receive a portion of the direct fee, commission or adviser fee paid to Apollonias Wealth Management Pty Ltd by Nextplan. Specific details of this will be provided to you in the SoA.

In addition to retaining 5% of all income collected, Nextplan will also collect an annual Flat Fee from Denver Jansz.

Please note that at no time will you pay Denver Jansz or Apollonias Wealth Management Pty Ltd directly.

Will anyone be paid for referring me to my Adviser?

From time to time an accountant or other professional may be paid for making referrals to me. The amount paid is not ascertainable; however, where any amount is payable, it will be fully disclosed in the ‘Statement of Advice’ (SoA) or any other advice document provided to you.

Further questions?

If you have any further questions about the services Nextplan provides, please contact Denver Jansz at 0407 338 339 or via Email: denver@apollonias.com.au

You should retain this FSG for your reference and any future dealings with Denver Jansz, Apollonias Wealth Management Pty Ltd or Nextplan.

Financial Services Guide Acknowledgement of Receipt

I/We acknowledge receiving a copy of the Nextplan Financial Pty Ltd Financial Services Guide Version 6.0 dated 01 January 2020 including the Authorised Representative Profile for Denver Jansz dated 02 March 2020 and I/we acknowledge that I/we have been given an opportunity to read the Financial Services Guide.

Client Name	Client Signature	Date

or

Financial Services Guide Confirmation of Provision

I confirm that I sent a copy of the Nextplan Financial Pty Ltd Financial Services Guide Version 6.0 dated 01 January 2020 including the Authorised Representative Profile for Denver Jansz dated 02 March 2020 to:

Client Name	
Postal/Email Address	
Date Sent	
Adviser Signature	

The Financial Planning Process

