

Adviser Profile

Wayne Roggero

Strategic Solutions Australia (ABN 90 070 215 360, AFSL 229168) authorizes your financial adviser to distribute this document.

This document forms part of, and should be read in conjunction with, the Strategic Solutions Australia Financial Services Guide (FSG).

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SSA Strategic Solutions
A U S T R A L I A
If you can't predict your future, plan it



Wayne Roggero

✉ wayne@ssaftp.com.au

☎ +61 7 3856 2255

📱 0417 637 897

🌐 ssaftp.com.au



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Strategic Solutions Australia is a wholly owned subsidiary of HMW Group, specialising in creating plans for each client based on their personal position and goals, developing pragmatic, achievable strategies aimed at strengthening financial security to provide resilience and peace of mind.

Our Specialties

- Wealth creation and protection strategies
- Independent investment advice and reporting
- Retirement planning
- Superannuation advice and compliance
- Estate and succession planning
- Advice on insurance cover, including Life Cover, Total Permanent Disablement, Trauma/Critical Illness and Income Protection.

Wayne commenced his career as a financial adviser in 1984 and became a representative of Strategic Solutions Australia on 8 April 2002.

1 Qualifications

Diploma of Financial Planning
Certified Financial Planner

2 Memberships

Financial Planning Association (FPA).

3 Financial Advisers Standards and Ethics Authority Requirements (FASEA)

Passed the Financial Advisers Exam



Services

Wayne is authorised to provide the following services:



Wealth Creation and Investments

- Deposit products
- Investment bonds
- Managed investments
- Exchange traded products
- Listed securities (shares and other products)
- Margin lending
- Gearing
- Derivatives



Superannuation and Retirement Planning

- Personal superannuation
- Pensions and annuities
- Self-managed superannuation
- Centrelink/Veteran's Affairs assistance
- Aged care



Wealth Protection

- Personal Insurance
- Business Insurance
- Insurance claims assistance



Other Financial Planning Services

- Budgeting and cashflow management
- Debt management
- Estate planning assistance

Remuneration

Wayne is remunerated by salary. This table summarises the types of fees or commissions that are applicable to the services he provides.

These figures are to be used as a guide only. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply.

All amounts are inclusive of Goods and Services Tax (GST).

Remuneration Type	From	To
Implementation fee	\$550	\$5,500
SoA Preparation Fee	\$1,100	\$8,250
Hourly Rate*	\$132	\$440

*Hourly fee varies between each staff member, and the cost to you will alter depending on the task performed.

Remuneration Type	Initial	Ongoing
Adviser Service Fee	\$0	\$2,640 to \$20,000
Adviser Service Fee**	0%	0% to 0.88%
Contribution Fee**	0%	0%
Investment Commission**	0%	0%
Insurance Commission*	0% to 66%^	0% to 35%

** Based on a percentage of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued prior to 1 January 2020 commission of up to 13-% will apply to additional cover.

For example, a 1% Adviser Service Fee on a \$200,000 investment would result in a fee payable of \$2,000.



Benefits, interests and associations

The business, associated entities or Wayne currently have arrangements with the following businesses or associated entities that may be capable or reasonably seen to be capable of influencing his advice.

Arrangements may include payments or benefits and, or where another party may benefit financially should you utilise certain services or products.

Where applicable, the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

Related Parties

- The HMW Accounting & Financial Group Pty Ltd
- HMW Capital Pty Ltd
- Trilogy Care Pty Ltd
- Quintessential Finance Pty Ltd
- Adapt Housing Pty Ltd
- Hall Project Management Pty Ltd

Shareholdings

- The HMW Accounting & Financial Group Pty Ltd
- AMP Capital

Referral Parties

Nil.

Product Arrangements

Nil.

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