

# About Your Adviser

## Calan Choke

Authorised Representative No. 336265

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## Calan Wealth Management Pty Ltd

Authorised Representative No. 1252159

## Business Contact Details

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Camberwell VIC 3124

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## About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 2010 and became an authorised representative of Alliance Wealth Pty Ltd on 07 December 2021.

I hold the following qualifications:

- Bachelor of Business (Economics and Finance)
- Graduate Diploma of Accounting
- Diploma of Financial Services (Financial Planning)
- Self Managed Superannuation Funds Program

I hold the following memberships:

- Certified Financial Planner ® of the Financial Planning Association of Australia
- Certified Practising Accountant (Financial Planning Specialist) of the CPA Australia

I am authorised to provide the following financial services:

### Superannuation and Retirement Planning

Personal Superannuation  
Corporate Superannuation  
Industry and Public Sector Superannuation  
Pensions and Annuities  
Self-Managed Superannuation  
Centrelink / Veterans' Affairs Assistance

### Wealth Creation and Investments

Cash and Term Deposits  
Investment Bonds  
Managed Investments

### Wealth Protection

Term Life Insurance  
Total and Permanent Disability (TPD) Insurance  
Trauma Insurance  
Income Protection Insurance  
Business Insurance  
Insurance Claims Assistance

### Other Financial Planning Services

Budgeting and Cashflow Management  
Debt Management

## My Remuneration

I am remunerated by:

- Salary

The following table summarises the types of fees or commissions that are applicable to the services that I provide. 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).

Type of Remuneration	From	To
Hourly Rate		\$330

Type of Remuneration	Initial	Per Annum
Adviser Service Fee	\$1,250 to \$2,500	\$2,400 to \$3,300
Insurance Commission*	0% to 66%^	0% to 31.13%

\* Based on a % of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

## Benefits, Interests and Associations

The Business, associated entities or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.