



FINANCIAL ADVISER PROFILE

Wesley Steer

Principal Financial Planner



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Overview

Wesley Steer and Steering Wealth are Authorised Representative acting under authority from Lionsgate Financial Group. His ASIC authorised representative No. is 1270368

Wesley Steer has been in Financial Services since January 2018 working in a number of finance and accounting roles.

He has worked with many different Australians and assisted them with their finance, however now he is focusing on helping young Australians in their 20s and 30s with their finances.

Wesley loves being able to help young Australians achieve their financial dreams including homeownership and financial independence.

By working with Wesley you will get a financial planner that would go into detail to understand your wants and aspirations. He will develop a financial plan that is customised to you and your situation.

Education

Bachelor of Accounting

La Trobe University

Bachelor of Finance

La Trobe University

Ethics and Professionalism in Financial Advice

Kaplan Professional

Certificate IV in Training and Assessment

Melbourne Polytechnic

Authorisations

Wesley is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts (“RSA”) products;
- Superannuation; and
- Securities.

Advice Fees and Charges

Wesley will be paid by Financial Planning Advice Fees as described in the Financial Services Guide.

The amount of the benefit and how it is calculated will be advised to you.

The cost of providing a financial product or service to you will depend on the nature and complexity of the advice, financial product and/or service provided. Generally, whenever your Adviser provides a recommendation for a financial product or service, your Adviser may be remunerated through either:

- An initial fee for service; and/or
- An ongoing fee for service; or
- A contribution fee or implementation fee; or
- Commission payments from product providers where applicable; or
- A combination of any of the above.

Details of the ranges and amounts of remuneration are set out below. Amounts are inclusive of GST.

Type of Remuneration	Initial	Ongoing
Ongoing Adviser Service Fees	-	\$2,000 - \$15,000
Ongoing Adviser Service Fees	-	0.10%-2.20%
SoA Preparation Fee	\$0 - \$15,000	-
Hourly Rate	\$500	-
Investment Commission*	-	-
Insurance Commission^	66%	22%-33%

*based on a % of funds invested

^based on a % of the premium

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply.

Wesley pays licensing fees to Lionsgate Financial Group Pty Ltd and will receive 100% of all revenue earned from the financial services provided to you.

Other Benefits Wesley Steer May Receive

From time to time, Wesley may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information, you can request a copy of the register.