

# ADVISER PROFILE

## YOUR ADVISER

**Chris Jensen**  
Authorised Representative 273571

Jensen Financial Planning Pty Ltd  
Corporate Authorised Representative  
Representative No. 253416

### Profile:

Jensen Financial Planning Pty Ltd is an established Financial Planning Representative of Aon Wealth Management Limited. As an authorised representative, our primary duty is to you and not any particular Life Insurance Company. Consequently, it is our responsibility to provide appropriate advice and recommendations that are consistent with your financial needs and objectives. Furthermore, it is our duty to provide appropriate solutions based on the information provided by you. We have access to specialist advice on tax planning, estate planning and direct equities. Where required, these areas of advice are provided only by referral. Whether you use one of our referrals or a professional that you currently have an involvement with, they will be responsible for the advice provided to you.

Chris Jensen has been individually authorised (Representative Number 273571) to provide financial product advice and deal in all of the below mentioned categories as a Director of Jensen Financial Planning Pty Ltd on behalf of Aon Wealth Management Limited.

### Experience:

Chris Jensen has been working in the Financial Services industry since 1989. Chris has successfully completed the Diploma of Financial Planning at Deakin University and is a Certified Financial Planner, as designated by the Financial Planning Association of Australia.

### Qualifications:

- Diploma of Financial Planning: Dip FP
- Certified Financial Planner: CFP

### Professional Memberships:

Chris Jensen is an affiliate member of the Financial Planning Association and abides by their code of ethics

### Contact Details:

Suite 2, Level 1, 20 Collins Street  
Melbourne VIC 3000

Phone: (03) 9669 6500  
Fax: (03) 9639 1334

### Appointment Location:

Level 51, 80 Collins Street  
Melbourne VIC 3000

## AUTHORISATIONS

Chris Jensen is authorised to provide financial product advice and deal in the following:

- deposit and payment products limited to:
  - basic deposit products;
  - deposit products other than basic deposit products;
- life products including:
  - investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
  - life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- interest in managed investment schemes including investor directed portfolio services;
- retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997);
- superannuation

**Aon Wealth Management Limited**

Australian Financial Services Licence No. 239187

ABN 14 003 344 232

*This Adviser Profile has been authorised for distribution by Aon Wealth Management Limited*

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## FEES & CHARGES

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<b>Initial Consultation:</b>	Free of charge
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<b>Advice Preparation:</b>	Completion of needs analysis: Free Advice preparation: \$660 - \$8,800 The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required. It is calculated based on our hourly consulting fee. (Refer to Consulting Fee below). Prior to you agreeing to proceed with the preparation of of Advice, the actual fee will be quoted to you and agreed on in writing.
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<b>Implementation:</b>	Implementation fee - \$660 up to a maximum of \$4,400. This fee may be paid by cheque or taken from any investment product as a once-off fee. The above reflects the fee range. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments. There is no implementation fee for the establishment of personal risk insurance recommendations. Jensen Financial Planning will receive a brokerage paid by the insurer.
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<b>Ongoing Review &amp; Strategic Service Fee:</b>	A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of: 0.88% - for the Funds under Management up to \$500,000 0.66% - for the Funds under Management from \$500,001 to \$1,500,000 0.35% - for the Funds under Management from \$1,500,001 upwards <ul style="list-style-type: none"><li>• The above tiers downwards as FUM increase.</li><li>• If new/separate investment advice is required due to a change in situation the standard advice preparation fees apply.</li><li>• The above fee scale applies to investment portfolios only.</li><li>• Fixed investment switching admin fee of \$27.50 is charged on investment switches where appropriate.</li></ul>
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<b>Consulting Fees:</b>	\$275 per hour For any other service you require that is not specified above, we will charge you at the above hourly rate.
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<b>Commissions:</b>	Refer to the Financial Services Guide for a detailed explanation of commissions that may be paid to me by product issuer(s).
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**Note: All fees and charges quoted are inclusive of GST.**