

About Your Adviser



Angela Surch

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Surch Financial Group Pty Ltd

Authorised Representative No. 1275571

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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 2008 and became an authorised representative of Alliance Wealth Pty Ltd on 11 May 2022.

I hold the following qualifications:

- Bachelor of Commerce (Accounting and Financial Planning)
- Margin Lending and Geared Investments Course
- Accredited Listed Product Adviser Program

I hold the following memberships:

- Practitioner Member of the Association of Financial Advisers

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
Centrelink / Veterans' Affairs Assistance

Wealth Creation and Investments

Cash and Term Deposits
Investment Bonds
Managed Investments
Exchange Traded Products
Listed Securities (Shares and other products)
Margin Lending
Gearing

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 plus profit share

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
Implementation Fee	\$550	\$3,300
SoA Preparation Fee	\$2,200	\$4,400
Hourly Rate		\$275

Type of Remuneration	Initial	Per Annum
Adviser Service Fee		\$770 to \$12,000
Insurance Commission*	0% to 66%	0% to 33%

* 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.