



ORBISWEALTH

Financial Adviser Profile

Overview

Jolyon has experience in the Wealth Management, Stockbroking and Financial Planning sectors. At Orbis Wealth Jolyon provides holistic financial planning advice to clients of a diverse range of backgrounds, and varying needs/objectives.

He is highly motivated to enable his clients to meet and exceed their financial, lifestyle and personal goals and takes a keen interest to help educate them on the financial matters which are important to them. Jolyon loves building and maintaining his relationships with clients to enable them to achieve peace of mind and financial freedom.

Jolyon Peters is a Sub-Authorised Representative of Orbis Wealth Pty Ltd, Corporate Authorised Representative No. 1007405. Authorised Representative No. 1297634.

Qualifications

Jolyon Peters holds the following qualifications and meets the competency requirements under ASIC's Regulatory Guide RG 146.

- Graduate Diploma of Financial Planning
- Bachelor of Commerce (Finance & Economics majors)
- Bachelor of Laws
- Honours Degree in Law

Authorisations

Jolyon Peters is authorised as a Provisional Financial Adviser and is able to provide advice and deal (under supervision of a senior Capstone Financial Adviser) 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;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;

Jolyon Peters is currently undertaking a Professional Year of work and training in accordance with subsection 921B(4) of the Corporations Act 2001. Their Supervisor during this period is Simon Dundas-Smith 437902 of Orbis Wealth Pty Ltd.



Jolyon Peters

Orbis Wealth

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Simon Dundas-Smith will be responsible for any advice provided by Jolyon Peters during that time.

Jolyon Peters is authorised to provide financial advice, conduct client meetings and prepare advice documents only under the supervision of a senior Capstone Financial Adviser.

Orbis Wealth Advice Fees and Charges

Jolyon Peters 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 during your initial meeting.

Jolyon Peters fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.

Orbis Wealth pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Jolyon Peters is a salaried employee of Orbis Wealth and will receive a salary/benefit from this company.

Other Benefits Jolyon May Receive

From time to time Jolyon Peters 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.

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Level 14, 461 Bourke Street
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This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.