

Adviser profile

Jeffrey Whitton

trading as Jeffrey P. Whitton and Associates

Authorised Representative No. 253578

Your adviser

Contact details

Office address 'Nexus Building' Suite 510, 4 Columbia Court, Baulkham Hills NSW 2153
Postal address PO Box 7967, Baulkham Hills BC NSW 1755
Phone 02 8852 5757
Fax 02 8852 5777
Email jeff@jwhitton.com.au
Website <http://conceptwealth.com.au/home>



Jeffrey Whitton

Profile

Jeff's primary aim is to provide his valued clients with quality advice and assistance in assessing their current and future needs which results in him providing the appropriate advice and outcome in the following areas:

Financial Planning, Personal & Corporate Superannuation, Investment Advice, Individual & Family Lifestyle protection, Business Insurance Estate Planning.

Jeff Whitton has been individually authorised (Representative Number 253578) to provide financial product advice and deal in all of the below mentioned categories as an authorised representative on behalf of Aon Hewitt Financial Advice Limited.

Jeff prides himself on providing accurate, informative and punctual service.

Experience

Jeff has been in the financial services industry since 1986 commencing as a Life Insurance agent with AMP.

In 1990 he became a Licenced Representative after leaving AMP and has been one ever since.

Jeff has 26 years' experience working in:

- Corporate superannuation
- Business insurance
- Risk insurance including life, TPD, Trauma and Income protection.
- Retirement planning
- Investment of managed funds

Qualifications

Diploma of Financial Planning

Kaplan – Certificate in Self-Managed Superannuation Funds

Professional memberships

Jeff is an Associate Financial Planner of the Financial Planning Association and abides by their code of ethics.

Authorisations

Australian Financial Services License

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

- i. deposit and payment products limited to:
 - a. basic deposit products;
 - b. deposit products other than basic deposit products;
- ii. life products including:
 - a. 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
 - b. 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;
- iii. securities;
- iv. interest in managed investment schemes including investor directed portfolio services;
- v. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
- vi. superannuation.

Fees and charges

Initial consultation

Complimentary. The purpose of this meeting is to complete a need analysis and discuss your advice requirements and agree on the next steps.

Advice preparation

From \$600 to \$4,500. This varies on the complexity of the advice require and cash flow projections and will be advised to you prior to the preparation of the advice document being a 'Statement of Advice'

Completion of needs analysis: Free

The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required.

Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

Implementation

Up to 0.6% for up to \$100,000

Up to 0.5% from \$100,001 to \$250,000

Up to 0.4% for any amount over \$250,001

Up to 0.3% for any amounts above \$500,001

This fee may be paid by cheque or collected from the investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review service

A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 2%.

This fee is an agreed fee which is determined at the initial consultation but subject to change pending portfolio complexity.

Consulting fees

Consultation only: \$350 per hour

For any other service you require that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.