Financial Adviser Profile

Overview

Robert is the Managing Director and Principal Advisor of Pinnacle Private Wealth Pty Ltd. With his extensive background in the Australian Financial Planning Sector, Robert has over 15 years' experience as a Senior Financial Planner offering advice to individual clients as well as small and large Business clients.

Robert has extensive experience in Retirement Planning, Wealth Creation, Tax-Effective Investment Strategies, Superannuation, Self-Managed Super Funds (SMSF) and Centrelink entitlements. His key role is to provide Holistic advice and work closely with our clients to meet their lifestyle goals and objectives.

Robert will take the time to listen and understand each clients' needs and aspirations. Once this is achieved, he will create a Medium-to Long-Term strategy to assist clients' to reach the Pinnacle of their Financial Goals and Aspirations.

This experience provides a unique blend of skills suitable for clients seeking quality strategic advice and comprehensive financial planning.

Robert Holds an Advance Diploma Financial Services (Financial Planning) and is accredited with Margin Lending and Self-managed Super Funds qualification.

Robert Galey is a Sub-Authorised Representative of Pinnacle Private Wealth Pty Ltd, Corporate Authorised Representative No. 1240358. Authorised Representative No. 1003282.

Qualifications

Robert holds the following industry qualifications:

- Advance Diploma of Financial Services (Financial Planning)
- Margin Lending and Geared Investments
- Self-Managed Super Funds.

Robert meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Robert Galey is a member of the Financial Advice Association of Australia (FAAA) and Tax Practitioner Board and abides by their code of professional conduct and ethics.

Robert Galey

Pinnacle Private Wealth

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Financial Adviser Profile

Authorisations

Robert 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;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;
- Self-Managed Superannuation Funds;
- Standard Margin Lending Facility.

Pinnacle Private Wealth Fees and Charges

Robert 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.

Robert's 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.

Robert provides the option of ongoing reporting and advisory services. This fee is up to 1.10% p.a. of the value of your holdings incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Pinnacle Private 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. Robert is the Director of Pinnacle Private Wealth Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Robert Galey May Receive

From time to time Robert Galey 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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