Kearney Group

Pioneering advice from preeminent advisers.

Adviser Profile for **Andrew Mackenzie.**

17 June 2020 - version 4
Imagineering FS Pty Ltd ABN 41 627 350 636
Australian Financial Services Licence 510873

I am sub-authorised by Kearney Group Private Wealth Pty Ltd (ABN 39 159 163 774) ('Kearney Group Private Wealth') to provide the financial services described in Section 2 of this Adviser Profile. Kearney Group Private Wealth is a Corporate Authorised Representative of:

Imagineering FS Pty Ltd ('Imagineering')

ABN 41 627 350 636
Australian Financial Services Licence No. 510873 ('AFSL')
Suite 8, 651 Victoria Street, Abbotsford, VIC 3067
PO Box 3347, Burnley North, VIC 3121

Email: finplan@kearneygroup.com.au
Website: www.kearneygroup.com.au
Phone: +61 3 9428 8822

The full list of financial services that Imagineering and Kearney Group Private Wealth can provide is set out in the Financial Services Guide ('FSG' or 'Guide'), which you have received along with this Adviser Profile. This Adviser Profile forms part of the FSG. Please contact Kearney Group Private Wealth if you have not been given an FSG.

In this document, the terms 'I', 'me', 'us', 'we' and 'our' refer to Kearney Group Private Wealth. The term 'Licensee' refers to Imagineering.

About your adviser.

Who is your Financial Adviser?

Your Financial Adviser is Andrew Mackenzie.

My Authorised Representative number is 274752.

What experience does your Financial Adviser have?

I have extensive experience in the financial planning profession dating back to 2004. I began providing financial advice in 2008 and I joined Kearney Group Private Wealth in 2010.

I offer integrated and holistic financial services to individuals and households, including complex families with multi-generational wealth and strategy needs.

What qualifications and professional memberships does your Financial Adviser have?

- I am a Certified Financial Planner®.
- I hold a Bachelor of Economics from LaTrobe University.
- I hold a Diploma of Financial Planning and an Advanced Diploma of Financial Planning.
- I am a member of the Financial Planning Association of Australia Limited (FPA).

Does your Financial Adviser have any associations or relationships?

I have an association with Kearney Group Private Wealth as an employee and shareholder. Fees and commissions are paid to Kearney Group Private Wealth by Imagineering. Kearney Group Private Wealth is a Corporate Authorised Representative of Imagineering. Kearney Group Private Wealth's Corporate Authorised Representative number is 423942.

How can you provide your instructions to your Financial Adviser?

You may provide instructions to your Financial Adviser by using any of the contact details provided in *Section 3: Contact & Acknowledgment*.

Section 2: Services.

The services I provide.

In which area(s) is your Financial Adviser authorised to provide advice?

I am authorised by Kearney Group Private Wealth to provide financial services, including advice or services in the following areas:

- deposit and payment products including non-basic deposit products (e.g. term deposits);
- government debentures, stocks or bonds;
- life investment and life risk products (e.g life insurance);
- managed investment schemes including investor directed portfolio services (e.g. exchange traded funds);
- standard margin lending facilities;
- retirement savings account products;
- securities (e.g. shares); and
- superannuation.

Please ask me if you would like a referral for any other services. If I receive a specific fee for this referral, it will be disclosed in an advice document such as a Statement of Advice ('SoA'), if I provide you with personal advice.

Section 3: Contact & Acknowledgement.

How you can contact your Financial Adviser.

Your Financial Adviser	
Financial Adviser:	**Andrew Mackenzie** of Kearney Group Private Wealth
Phone:	+61 3 9428 8822
Email:	andrew.mackenzie@kearneygroup.com.au
Practice Details	
Phone:	+61 3 9428 8822
Email:	finplan@kearneygroup.com.au
Web:	www.kearneygroup.com.au
Street Address:	Suite 8, 651 Victoria Street ABBOTSFORD, VIC 3067
Postal Address:	PO Box 3347 BURNLEY NORTH, VIC 3121

Acknowledgement: Client Copy.

I/We acknowledge that I was / we were provided with the Imagineering FS Pty Ltd Financial Services Guide dated 17 June 2020.

Client name: ______________________________

Client signature: ____________________ Date received: ____________

Client name: ______________________________

Client signature: ____________________ Date received: ____________

OR Adviser to complete as follows if Financial Services Guide is sent (physical or electronic copy) to Client(s):

I confirm that I sent a copy of the Imagineering FS Pty Ltd Financial Services Guide dated 17 June 2020:

Sent to: ____________________ Via: ____________________

Sent by: ____________________ Sent on: ____________________

Sent to: ____________________ Via: ____________________

Sent by: ____________________ Sent on: ____________________

Acknowledgement: Adviser Copy (retain on client file).

I/We acknowledge that I was/we were provided with the Imagineering FS Pty Ltd Financial Services Guide dated 17 June 2020.

Client name: ____________________

Client signature: ____________________ Date received: ____________________

Client name: ____________________

Client signature: ____________________ Date received: ____________________

OR Adviser to complete as follows where Financial Services Guide has been mailed / provided electronically to Client(s):

I confirm that I sent a copy of the Imagineering FS Pty Ltd Financial Services Guide dated 17 June 2020:

Sent to: ____________________ Via: ____________________

Sent by: ____________________ Sent on: ____________________

Sent to: ____________________ Via: ____________________

Sent by: ____________________ Sent on: ____________________