

Pioneering advice from preeminent advisers.

Adviser Profile for **Jack Ngo.**

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 137, 425 Smith Street, Fitzroy VIC 3065

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 Jack Ngo.

My Authorised Representative number is 001001377.

What experience does your Financial Adviser have?

I have extensive experience in the financial planning profession dating back to 2007. I began providing financial advice in 2013 and I joined Kearney Group Private Wealth in 2021.

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 Commerce from Melbourne University.
- I hold a Bachelor of Laws from Melbourne University.
- I hold a Masters of Wealth Management from Deakin University.
- I am a member of the Tax Practitioners Board as a Tax (financial) Adviser.
- I have completed the FASEA exam.

Does your Financial Adviser have any associations or relationships?

I have an association with Kearney Group Private Wealth as an employee. 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: | Jack Ngo of Kearney Group Private Wealth |
| Phone: | +61 3 9428 8822 |
| Email: | jack.ngo@kearneygroup.com.au |
| Practice Details | |
| Phone: | +61 3 9428 8822 |
| Email: | finplan@kearneygroup.com.au |
| Web: | www.kearneygroup.com.au |
| Street Address: | Suite 137, 425 Smith Street, Fitzroy VIC 3065 |
| 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 version 7 dated 10 December 2021.

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 version 7 dated 10 December 2021:

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 version 7 dated 10 December 2021.

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 version 7 dated 10 December 2021:

Sent to: _____

Via: _____

Sent by: _____

Sent on: _____

Sent to: _____

Via: _____

Sent by: _____

Sent on: _____