

# Adviser Profile

**SODA WEALTH**

## Overview

With over 16 years' experience as a Financial Planner, I continue to be passionate about helping clients on the journey to achieving their financial goals. At SODA Wealth, our aim is to help guide every individual client to realise their financial potential so that they can live their lives. We specialise in a range of advice areas from personal insurance to help protect you and your loved ones, to planning for your retirement, dealing with Centrelink and Aged Care.

Feel free to come and have a no obligation chat to see what we can do for you.

Daniel Leow is a Sub-Authorised Representative of SODA WEALTH ADVICE Pty Ltd, Corporate Authorised Representative No. 1280279. Authorised Representative No. 1003847.

## Qualifications

Daniel holds a Bachelor of Business (Financial Planning) and meets the competency requirements under ASICs Regulatory Guide RG 146.

## Professional Memberships

Daniel Leow is a member of Association of Financial Advisers and abides by their code of professional conduct and ethics.

## Authorisations

Daniel Leow is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation.



**Daniel Leow**

**SODA WEALTH**

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### **SODA WEALTH Advice Fees and Charges**

Daniel 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.

Daniel'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.

Daniel provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

SODA WEALTH ADVICE PTY LTD pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Daniel Leow is a Director of SODA WEALTH ADVICE PTY LTD and will receive a salary/benefit from this company.

### **Other Benefits Adviser May Receive**

From time to time Daniel Leow 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.