

# Supplement to Financial Services Guide

**ANTHONY DUNN**

Director

For

## **Queensland Professional Advisory Services Pty Ltd**

Corporate Authorised Representative of Financial Force Pty Ltd

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## **FinancialForce**

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## ADVISER DETAILS

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| <p><i>Who is my adviser and what experience do they have?</i></p>   | <p><b>Anthony Dunn BA Acc</b><br/> <b>Anthony Dunn</b> is an authorised representative of Financial Force Pty Ltd, and is the director of this independently owned company.</p> <p>Over 50% of Anthony's clients have established their own Self-Managed Superannuation Fund to administer their retirement benefits. By doing so, they ensure that their funds are maintained in a tax effective vehicle with flexibility and control over how their funds are invested. Anthony provides advice on establishment of the fund, asset allocation in a diversified portfolio, restructuring of superannuation funds to maximise tax benefits, and appropriate investment strategies to generate sufficient income for retirement years.</p>                                                                                                                                                                                                                              |
| <p><i>What are my adviser's educational qualifications?</i></p>     | <p><b>Anthony Dunn</b> has achieved the level of education required to comply with the requirements of ASIC. He has been working in the financial sector since 1987.</p> <p>In 1983 Anthony graduated from University of Canberra, previously known as Canberra University, as a Bachelor of Arts in Accounting. He is a qualified accountant with over 8 years of industry experience in variety of roles prior to commencing work in the financial planning industry.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p><i>What advisory services are available from my adviser?</i></p> | <p><b>Anthony Dunn</b> is authorised to give advice on a wide range of <b>life insurances, managed funds and shares</b>, as well as appropriate <b>superannuation and non-superannuation</b> structures for holding investments. Anthony specialises in investors with large portfolios of <b>direct shares and managed funds</b>, and investment vehicles such as <b>Self-Managed Superannuation Fund and Master Trusts</b>.</p> <p>Anthony has been assisting members of local Credit Unions, and clients of accounting firms with investment advice, superannuation and <b>retirement planning</b>.</p> <p>For each of his clients Anthony prepares a comprehensive Statement of Advice that addresses matters such as: financial goals and the best strategies for achieving these goals; a <b>recommend investment portfolio</b> consistent with the individual client's risk profile; <b>income flows and taxation; estate planning; and risk management</b>.</p> |
| <p><i>How do I pay for services I receive from my adviser?</i></p>  | <p>This is agreed between you and your adviser as part of your initial or ongoing meeting(s). The payment is designed to best suit your circumstances and may be a <b>fixed monthly fee</b>, a <b>percentage</b> of funders under advice or a <b>combination</b>.</p> <p>The fees may also be a combination of a <b>fee directly</b> charged to your investment or superannuation fund via a time based fee for service.</p> <p>Given that each person's circumstances and the type of service and advice vary, it is not practical to list here a set of arbitrary fees. Any fees and costs for our services are fully disclosed and discussed with you once your requirements are determined, they will also be detailed in any written advice statement.</p>                                                                                                                                                                                                         |
| <p><i>What conflicts of interest might my adviser have?</i></p>     | <p>Within the provision of advice to clients there may from time to time arise a conflict of interest. When conflicts do occur we are required by law to inform you of any such conflict.</p> <p>Anthony Dunn takes the issue of conflicts and professional conduct extremely seriously and will openly deal with any such conflict should it arise.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |