

About Your Adviser



Paul ter Bogt

Authorised Representative No. 298957

Segment Wealth

Terbo Pty Ltd

Authorised Representative No. 1286022

Business Contact Details

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About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 2006 and became an authorised representative of Alliance Wealth Pty Ltd on 23 March 2021.

I hold the following qualifications:

- Diploma in Financial Advising

I hold the following memberships:

- Practitioner Member of the Association of Financial Advisers

I am authorised to provide the following financial services:

Superannuation and Retirement Planning

Personal Superannuation
Corporate Superannuation
Industry and Public Sector Superannuation
Pensions and Annuities
Centrelink / Veterans' Affairs Assistance

Wealth Creation and Investments

Cash and Term Deposits
Investment Bonds
Managed Investments

Wealth Protection

Term Life Insurance
Total and Permanent Disability (TPD) Insurance
Trauma Insurance
Income Protection Insurance
Business Insurance
Insurance Claims Assistance

Other Financial Planning Services

Budgeting and Cashflow Management
Debt Management

My Remuneration

I am remunerated by:

- Salary plus profit share

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Type of Remuneration	From	To
SoA Preparation Fee	\$1,650	\$4,950
Hourly Rate		\$440

Type of Remuneration	Initial	Ongoing (pa)
Adviser Service Fee	\$3,300 to \$11,000	\$3,300 to \$11,000
Insurance Commission*	0% to 66%^	0% to 31.13%

* Based on a % of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

Benefits, Interests and Associations

The Business, associated entities or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.