

Financial Adviser Profile

Overview

With over 25 years' experience as a financial adviser, Kevin is passionate about working closely with his clients to gain a deeper understanding of their lifestyle and their financial goals and objectives, from which he formulates holistic strategies to assist in growing and securing their financial wellbeing. His experience and consultative style coupled with his reliability and ethical approach, builds successful relationships. Kevin is committed to helping his clients live their best lives everyday.

Kevin provides advice in all areas of financial advice including, wealth creation, superannuation & retirement planning, insurance and more specialised areas such as divorce & separation financial planning, social security and aged care.

Away from work, Kevin loves spending time with family and his partner, loves travel, and can often be found at a racetrack either driving his track car or watching motorsports on the sidelines.

Kevin Tate is a Sub-Authorised Representative of Family Financial Solutions Pty Ltd, Corporate Authorised Representative No. 1278733. Authorised Representative No.1004029.

Qualifications

Kevin holds an Advanced Diploma of Financial Planning, and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Kevin is a member of the Financial Advisers Association of Australia (FAAA) and abides by their code of professional conduct and ethics.

Service and Specialties

Kevin specialises in providing advice on the following areas:

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



Kevin Tate

Senior Financial Adviser

Family Financial Solutions

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Family Financial Solutions Advice Fees and Charges

Kevin Tate 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.

Kevin's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the advice provided. You will be notified of the costs involved prior to the commencement of any work.

Kevin 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.

Family Financial Solutions pays a fixed licensing fee to FF Solutions Group Pty Ltd and will receive all revenue earned from the financial services provided to you. Kevin is a salaried employee of Family Financial Solutions and will receive a salary and may also receive a percentage of revenue from this practice.

Other Benefits Kevin May Receive

From time to time Kevin 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.

Version 1.0



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