

Trent Sanfead

Financial Adviser

Trent entered the financial planning industry in 2002, quickly completing his Diploma of Financial Planning through Deakin University in association with the Financial Planning Association of Australia. At this time he helped implement a Financial Planning division within an accounting practice.

In 2005, utilising his experience, Trent entered into a partnership with several other Financial Advisers where he and the specialised team addressed all aspects of financial planning and helped hundreds of clients achieve their financial goals.

In January 2016 Trent was given the exciting opportunity to join Stottsure Financial Advice as a Financial Adviser where along with the already established dedicated team he can continue to deliver financial advice backed by his passion and over ten years' experience, so clients can continue to achieve their financial goals.

Trent is the past President of his BNI Chapter and now insists we call him 'El Presidente'.



Your Adviser

Your adviser Trent Sanfead is an Authorised Representative (No. 245185) of TWD Licensee Services Pty Ltd (ABN 88 605064 480 AFSL 475964) and is employed by Stottsure Financial Advice Pty Ltd, a corporate Authorised Representative (No. 269210) of TWD Licensee Services Pty Ltd.

Memberships

Trent is not a member of any professional bodies at present.

Qualifications

Dip FS (FP)

Advice Your Adviser Can Provide

Strategies

- Investment strategies including gearing and savings plans
- Budget and cash flow planning
- Debt management
- Superannuation advice, including salary sacrifice and consolidation strategies
- Personal insurance strategies
- Centrelink / DVA advice
- Retirement planning advice
- Estate planning advice
- Advice on ownership and structures e.g. discretionary and family trusts, Self-Managed Superannuation
- Portfolio review services
- Ongoing advisory services
- Referrals to specialists e.g. accountants, solicitors, mortgage and general insurance brokers
- ASX listed investments managed under a model portfolio

Products

- Derivatives
- Investment life insurance products or life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Securities
- Superannuation
- Deposit and payment products

How Your Adviser is Paid

As the licensee, TWD Licensee Services collects all advice fees and commissions. TWD Licensee Services then pays the fees and commissions to Stottsure as detailed in the Guide under 'How Stottsure is Paid'. Stottsure pays me out of the fees and commissions it receives from TWD Licensee Services, by one or more of the methods outlined below.

- Salary – I may be paid a salary based on my experience and capability.

At the time of providing advice, we will disclose the amounts that TWD Licensee Services, Stottsure and I receive (if any) as a result of that advice.

Client Fees and Payment Options

Before providing advice, we will agree the fees and payment options with you. The fee you pay will depend on the complexity of your circumstances and the services you require.

Our payment options may include a fee for service, commissions, or a combination of both.

Fee for Service

Fee for service is based on the service we provide. This fee can be determined by an hourly rate, a fixed dollar amount, a percentage of funds invested (excluding borrowed funds), or a combination of these methods.

We can invoice you directly for our fee for service. Alternatively, some products allow an adviser service fee to be deducted from the investment balance.

Commissions

Some product providers pay commissions to TWD Licensee Services. The amount of commissions received will depend upon the type of product and the amount invested or premium paid.

If we receive commissions as a result of recommending a product to you, we may reduce our fee for service.

In the event that we reduce our fee for service in this manner and you decide not to proceed with our recommendations, or if your insurance policies are cancelled within the first 2 years of acceptance (in which case the insurer claims back all or some of the commission paid to us), we may invoice you directly for the cost of our service.

Additional Privacy Disclosure – Our Business Partners

In order to keep our costs competitive, our practice uses specialist business support resources that are located in the following country/countries:

- Phillipines

The organisation/s we have contracted to support our business have confirmed to us they will adhere to the Australian Privacy Principles when dealing with your personal information. They will not contact you or share your information with any other party unless they have your express approval.

How to Find Me

If you would like to make an interview time to discuss your financial needs and objectives in more detail, please contact me on 08 9364 3160 or clientservices@stottsure.com.au.

This document, the Adviser Profile, should be read in conjunction with the TWD Licensee Services Pty Ltd Financial Services Guide (FSG).

Distribution of this Adviser Profile by the Authorised Representative/Adviser has been approved by TWD Licensee Services Pty Ltd.



67A Cranford Avenue
Brentwood WA 6153

(08) 9364 3160
clientservices@stottsure.com.au

stottsure.com.au