

Adviser Profile

Dawid van Dyk
BCom (Econ/Fin), Dip FP



This Adviser profile forms Part 2 of the Financial Service Guide (FSG) issued by Momentum Wealth Management Corporation Pty Ltd. The Financial Services Guide (FSG) is not complete without it.

Authorised Representative Number: 1270260
Corporate Authorised Representative Number: 343820
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I am an Authorised Representative, No 1270260, of Momentum Wealth Management Corporation Pty Ltd ABN 86 168 372 870, AFSL 454895. I am employed by Momentum Wealth Management Mount Waverley Pty Ltd ABN 49 111 772 242 (My Practice), which is a Corporate Authorised Representative of the licensee, Momentum Wealth Management Corporation Pty Ltd, CAR 343820.

The financial advice and other services received will be provided by me, or one of my colleagues, who is also an Authorised Representative of our licensee, Momentum Wealth Management Corporation Pty Ltd under AFSL 454895.

Qualifications and experience

I started in the financial planning industry in 2014 following the completion of my Bachelor of Commerce majoring in Economics and Finance, in South Africa.

I moved to Australia with my family in July 2017, to explore new opportunities. I joined Momentum Wealth Management in August 2017 as the company's paraplanner. Fast forward to today, I am a fully qualified and experienced Financial Planner, with a purpose to help individuals reach their financial goals with peace of mind. .

I am committed to consistently growing my knowledge in the financial planning industry. This includes being qualified to offer advice in the complex area of self-managed superannuation. This enables me to provide holistic advice with a high degree of value, ensuring individual objectives, purposes and intended outcomes are achieved.

My approach to advice is to add value wherever I can to ensure that everyone is appreciated and respected.

Services offered

I am authorised to provide advice in the following areas:

- Superannuation (incl. Self-Managed Superannuation)
- Retirement planning
- Investments, including savings plans.
- Approved ASX listed investments within the ASX 200
- Personal insurance
- Budget and cash flow planning
- Debt management
- Gearing
- Business insurance
- Centrelink / DVA
- Aged care
- Ownership and structures (e.g., discretionary and family trusts)
- Portfolio review
- Estate planning
- Ongoing advisory services
- Referrals to specialists (e.g., accountants, solicitors)

Products offered

I am authorised to deal in the following products:

- Deposit and payment products
- Life investment or life risk products
- Managed investment schemes including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Securities
- Superannuation

How I am paid

As the licensee, Momentum Wealth Management Corporation Pty Ltd collects all advice fees and commissions. Momentum Wealth Management Corporation Pty Ltd then pays the fees and commissions to my Practice as detailed in Part 1 of this FSG under 'How Are We Paid For Our Services'. My Practice pays me out of the fees and commissions it receives from the licensee Momentum Wealth Management Corporation Pty Ltd, by one or more of the methods outlined below.

- **Salary** – I am paid a salary based on my experience and capability.
- **Bonus** – I may be eligible to receive a bonus, based on a combination of revenue and certain non-financial measures (such as the quality of my service).

At the time of providing advice or as soon as practicable after that time, we will disclose the remuneration that Momentum Wealth Management Corporation Pty Ltd, my Practice and I receive (if any) as a result of that advice.

Client fee 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 fees are charged as fee for service.

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).
- 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: Please see Part 1 of the FSG for more information about the types of commission Momentum Wealth Management Corporation Pty Ltd may receive.

My contact details

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Phone	(03) 9886 1844
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