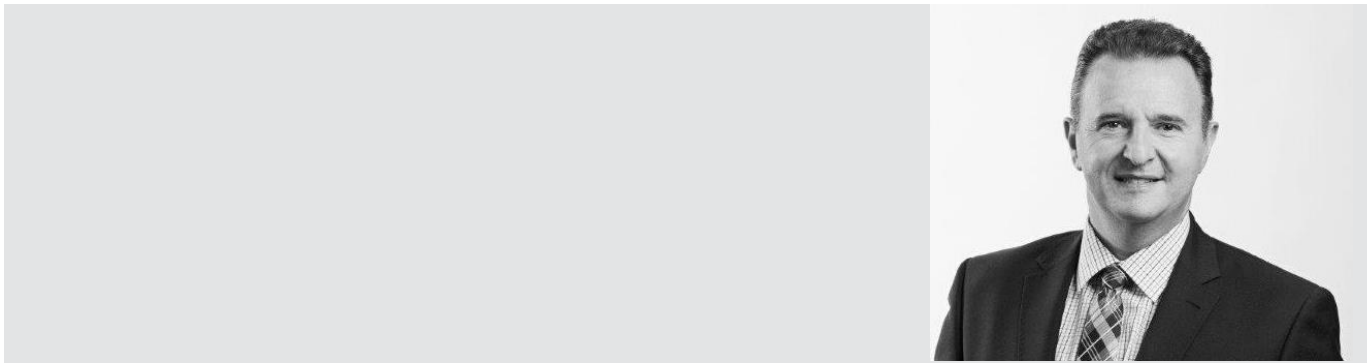


# Adviser Profile

**Peter Pallis**  
GradDipFinPlan



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

**Authorised Representative Number:** 1248484  
**Corporate Authorised Representative Number:** 343821  
**Adviser profile issue date:** 08/07/2024  
**Version:** 1.0

Peter Pallis is an Authorised Representative No 1248484 of Momentum Wealth Management Corporation Pty Ltd ABN 86 168 372 870, AFSL 454895. Peter Pallis is employed by Momentum Wealth Management Wantirna Pty Ltd ABN 93 111 379 643 (My Practice), which is a Corporate Authorised Representative of Momentum Wealth Management Corporation Pty Ltd, CAR 343821.

The financial advice and other services you receive will be provided to you by Peter Pallis, or one of his colleagues, who is also an Authorised Representative of Momentum Wealth Management Corporation Pty Ltd.

## Qualifications and experience

With over 25 years of experience in financial services and as a Financial Adviser since 2016, Peter has successfully helped a wide range of individuals and families improve their quality of life and achieve their financial goals through personalised strategies and prudent wealth management. He believes that having a commonsense approach combined with easy-to-understand financial advice is the best way to empower people to make sensible financial decisions.

Peter is passionate about helping people achieve greater financial security and takes a genuine interest in the welfare of his clients, establishing long-term relationships and working together as partners to build their financial independence. He considers a client-first approach, tailoring financial strategies to each client's unique circumstances and their long-term objectives. He regards understanding your cashflow needs, while minimising your tax liabilities and growing your wealth, to be important factors to determine your long-term financial well-being.

Peter believes that together, with the appropriately tailored advice, you can achieve the retirement you deserve.

## Services offered

I am authorised to provide advice in the following areas:

- Superannuation
- Retirement planning
- Investments, including savings plans
- Approved ASX listed investments within the ASX 200
- Personal & Business insurance
- Budget and cash flow planning
- Debt management
- Gearing
- Centrelink / DVA
- Aged care
- Ownership and structures (e.g., discretionary and family trusts)
- Self-managed superannuation
- 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
- Interests in 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 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, the 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 percentage of funds invested (excluding borrowed funds).
- A fixed dollar amount.
- 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

<b>Address</b>	Suite 4, 410 Burwood Highway, Wantirna South VIC 3152
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<b>Phone</b>	(03) 9800 1552
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