

# Adviser Profile

**Robert Syben**  
BEco, CFP®



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:** 264129  
**Corporate Authorised Representative Number:** 343820  
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Robert Syben is an Authorised Representative No 264129 of Momentum Wealth Management Corporation Pty Ltd ABN 86 168 372 870, AFSL 454895. Robert Syben is employed by Momentum Wealth Management Mount Waverley Pty Ltd ABN 49 111 772 242 (My Practice), which is a Corporate Authorised Representative of Momentum Wealth Management Corporation Pty Ltd, CAR 343820.

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

## Qualifications and experience

Robert joined Momentum Wealth Management in 2024 as a seasoned financial planning professional. Passionate about financial planning, he loves working with clients and providing them with advice that helps support achievement their financial and lifestyle objectives.

He is an accomplished financial adviser, skilled at working across the spectrum of client situations from HNW with multiple structures through to clients with Centrelink benefits or aged care needs.

His many years of experience as an adviser and team manager are underpinned by a Bachelor of Economics (with a major in accounting) from Monash University, a CFP designation and accreditation as an aged care specialist (from the FPA).

## 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

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<b>Phone</b>	(03) 9886 1844