

Adviser Profile

Kris Martin

Authorised Representative No. 253782

KDM Financial and Estate Planning Pty Ltd

Corporate Authorised Representative No. 425536

Your adviser

Contact details

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Kris Martin

Profile

Kris Martin is the principal adviser with KDM Financial and Estate Planning, specialising in the Risk Insurance, Personal Super, Estate Planning and Wealth Management.

Our mission is to use our knowledge and experience when helping businesses and individuals with their risk management, business succession and estate planning needs by building a friendly relationship in a holistic and honest manner.

Kris Martin has been individually authorised (Representative Number 253782) to provide financial product advice and deal in all of the below mentioned categories as Director of KDM Financial and Estate Planning on behalf of Aon Hewitt Financial Advice Limited.

Experience

Kris's work experience within the last 15 years has been made up of 4 years as a Risk Adviser for Futuro Financial Services, 4.5 years as a Financial Planner at ANZ Business Banking and the last 6.5 years as the Principal Financial Adviser for KDM Financial and Estate Planning.

Qualifications

2016 – Executive Master of Business Administration – QUT Gardens Point



2014 – Graduate Certificate of Business Administration – QUT Gardens Point



2012 – Fellow Chartered Financial Practitioner – Mentor



2011 – Advanced Diploma of Financial Services (Financial Planning) - Kaplan



2008 – Bachelor of Business – Australian Catholic University



Professional memberships

Association of Financial Advisers – QLD Gen Next Committee 2012

Authorisations

Australian Financial Services License

Kris is authorised to provide financial product advice and deal in the following:

- i. deposit and payment products limited to:
 - a. basic deposit products;
 - b. deposit products other than basic deposit products;
- ii. life products including:
 - a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
 - b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- iii. securities;
- iv. interest in managed investment schemes including investor directed portfolio services;
- v. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
- vi. superannuation.

Fees and charges

Initial consultation

Free of charge

Advice preparation

Completion of needs analysis: Free

Advice preparation: \$749 - \$2,449

The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required.

Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

Implementation

Up to 2% for up to \$100,000

Up to 1.5% from \$100,001 to \$250,000

Up to 1% for any amount over \$250,001

This fee may be paid by cheque or collected from the investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review service

A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 2%.

Consulting fees

\$220 per hour

For any other service you require that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Kris Martin is a Director of KDM Financial and Estate Planning and receives 20% of all upfront and ongoing fees received by KDM Financial and Estate Planning. Kris Martin also receives a salary and may also receive performance based bonuses from time to time.

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.