Adviser Profile

Fouad (George) Fattal

Authorised Representative No. 303887

MT Wealth- KDM Financial and Estate Planning Pty Ltd trading as MT Wealth


Fouad (George) Fattal

Your adviser

Contact details

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Profile

KDM Financial and Estate Planning, founded by Kris Martin in 2008, was formed to help individuals and business through the complex maze of wealth creation, superannuation, personal insurance and risk management

Please note that MT Wealth is the collaboration of Marsh Tincknell Accountants Pty Ltd and KDM Financial and Estate Planning Pty Ltd to ensure clients of both practices are provided a seamless and unparalleled level of service when managing all aspects of Accounting and Financial Planning needs

Fouad George Fattal has been individually authorised (Representative Number 303887) to provide financial product advice and deal in all of the below mentioned categories.

Experience

George has substantial service experience spanning over 15 years. He also held a role as a Financial Planner within one of Australia's premier banks. George remains in his role as a Financial Advisor with his focus on growing the business and to continue with providing financial advice to people who require his assistance.

Qualifications

Advanced Diploma of Financial Planning

Diploma of Financial Services (Financial Planning)

Certificate of Completion – Self Managed Superannuation Funds

Diploma of Management

Commissioner for Declaration

Professional memberships

Association of Financial Advisers (AFA)

Authorisations

Australian Financial Services License

George 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 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: $0-$7,700

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 Statement of Advice, the actual fee will be quoted to you.

Review Service

An ongoing adviser service fee will be calculated as a percentage of your total portfolio or a fixed fee (this will be negotiated with the client and will vary depending on the service required). The actual fee will be quoted to you.

Consulting Fees

$330 per hour

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

Commissions

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

George is an employee of KDM Financial and Estate Planning Pty Ltd and receives a salary and bonuses.

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.

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