Financial Adviser Profile

Overview

Tony Greenham is a Director and Financial Adviser at Elite Planning Australia with over 20 years' experience in financial services. He has held senior advisory, management and director roles across private client, boutique and national financial planning businesses. Tony specialises in strategic advice, particularly superannuation, investment structures and risk management. Clients benefit from his practical, tailored approach, working alongside their other professional advisers to review their financial structures, identify risks and provide clear advice to help align their strategy with their personal goals and needs.

Tony Greenham is a Sub-Authorised Representative of Elite Planning Australia Pty Ltd, Corporate Authorised Representative No. 1323065. Authorised Representative No. 303904.

Qualifications

Tony Greenham holds a Bachelor of Business, Accounting and Finance, a Diploma of Financial Planning and a Graduate Diploma of Financial Planning and meets the competency requirements under ASICs Regulatory Guide RG 146.

Authorisations

Tony Greenham is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation
- Self Managed Superannuation Funds
- Securities
- Standard Margin Lending Facility.

Anthony (Tony) Greenham
Director and Financial Adviser

Elite Planning Australia

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Financial Adviser Profile

Elite Planning Advice Fees and Charges

Tony Greenham will be paid Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Tony's hourly rate for Financial Services is $330 incl. GST. We will notify you of the fee charged prior to commencing any work if applicable.

Tony's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between $1,320 and $11,000 incl. GST.

Tony Greenham provides the option of ongoing reporting and advisory services. This may be a fixed fee, typically between $3,300 and $11,000 incl. GST, or a percentage of the funds invested up to 2%. The fee will vary depending on the complexity of the service to be provided. For example, if the percentage-based fee is 1.1% p.a. and you invest $300,000, your ongoing advice fee will be $3,300 incl. GST.

Elite Planning Australia pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Tony Greenham is a Director of Elite Planning Australia and will receive a salary/benefit from this company.

Other Benefits Tony May Receive

From time to time Tony may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than $300. A register listing the details of any non-cash benefits between $100 and $300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

Elite Planning Australia has a working relationship with Elite Finance Australia and Peak Settlements, businesses in which fellow Elite Planning Australia director and shareholder Matthew Posselt holds ownership interests. From time to time, clients may be referred to these businesses where their services are considered appropriate to the client's needs. Similarly, these businesses may refer clients to Elite Planning Australia for financial planning services. Elite Planning Australia and its advisers do not pay or receive any referral fees, commissions or direct monetary benefits in connection with these referrals. However, Elite Planning Australia may receive indirect non-monetary benefits through the professional relationship and mutual referral of clients between the businesses. Clients are under no obligation to use these service providers and may choose any provider they wish.

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