

Adviser Profile

Grant Goldsworthy

Authorised Representative No. 435423

All Financial Services (NSW) Pty Ltd

Corporate Authorised Representative No. 280477

Your adviser

Contact details

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Grant Goldsworthy

Profile

All Financial Services (NSW) Pty Limited (AFS) services have been developed and refined to impact the changing needs of the marketplace. Our services are applied with a touch of common sense and practicality, with the focus being on meeting client needs, with a diverse range of services all under the one roof.

AFS has developed a holistic approach to financial planning and risk management. AFS offers a wide range of associated services at the one location. AFS adopts a consultative process, focused on gathering information from our clients, to determine their short and long term goals.

Once our client's objectives are understood, we develop a roadmap in partnership with our clients, to guide them successfully in achieving their goals. This winning formula has given AFS market positioning that is envied by our competitors.

Grant Goldsworthy has been individually authorised (Representative Number 435423) to provide financial product advice and deal in all of the below mentioned categories as an employee of All Financial Services (NSW) Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.

Experience

Grant has worked in the financial planning industry since early 2012, after a career spanning 20 years in corporate management roles within the retail and franchising industries. Grant brings a practical level of understanding to financial advice via his experience with small business owners and franchisees.

Qualifications and certifications

Diploma of Financial Planning

Master of Business Administration

Self-Managed Superannuation Funds completed through Kaplan Education Pty Ltd

Margin Lending completed through Kaplan Education Pty Ltd

Professional memberships

Financial Planning Association of Australia (FPA)

Authorisations

Australian Financial Services License

Grant 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);
- vi. superannuation; and
- vii. standard margin lending facility.

Fees and charges

Initial consultation

Free of Charge

Investment advice: Corporate

Fees will depend on Corporate Superannuation Fund to which you are a member due to the agreement to which your employer has entered into.

Investment advice: Individual

	Amounts invested	Full Service Clients
AFS Advantage clients	\$0 to \$200,000)	No upfront fee Ongoing – 0.3% - 1.5%
AFS Plus clients	\$200,000 to \$500,000)	
AFS Wealth clients	\$500,000 to \$1,000,000)	
AFS Enhance clients	\$1,000,000 plus)	

Investment advice: Individual

	Amounts invested	Full Service Clients
Transaction Only clients	\$0 to \$200,000)	No upfront fee Ongoing – 0.3% - 1.5%
	\$200,000 to \$500,000)	
	\$500,000 to \$1,000,000)	
	\$1,000,000 plus)	

Enhancement Services

Portfolio Monitoring	\$ 150 - \$792 pa
My Folio	\$ 450 - \$1170
All Financial Services Multiport	\$3,300 pa (Adviser Fee)

Advice/Plan Fees

Plan fees may be charged for advice not taken, unless prior arrangements have been made:

Limited Statement of Advice (Risk only)	\$ 550 - \$850
Limited Statement of Advice (Risk/Super)	\$ 850 - \$1,950
Full Statement of Advice	\$1,950 - \$11,000

Implementation Fee

\$550 - \$1,650

Hourly Rate

\$130 - \$400

Commissions

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

Grant is an employee of All Financial Services and receives a salary.

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.