Financial Adviser Profile

Overview

There's no denying that the road to financial security can be rough and challenging - in fact more challenging for women than for men. With a financial strategy tailored to your unique circumstances we can help to make the road ahead a great deal smoother and achievable.

At Numero Wealth our goal, through education and regular contact, is to empower you to be self-sufficient and make confident decisions that will improve your financial situation. Providing you with the confidence to unburden yourself with having to make financial decisions on your own.

Understanding where you are currently at and what it is you are wanting to achieve helps to ensure that the foundation on which we build our advice is uniquely tailored to your specific needs and objectives. The better we understand you and your situation then the better any advice will fit.

When choosing a Financial Adviser, it is important to make sure you feel comfortable, you feel you are being heard and probably most importantly that you trust that your Adviser has your best interests first and foremost.

Because we feel this is important, the initial consultation is at our expense and there is no obligation to proceed any further on your part if the fit is not right.

Kellie Killgallon has over 20 years' experience in the industry and is a Sub-Authorised Representative of Numero Wealth Pty Ltd, Corporate Authorised Representative No. 1253474. Authorised Representative No. 1003794.

Qualifications

Kellie Killgallon holds a Bachelor of Business, Diploma of Financial Planning, Certified Financial Planner and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Kellie Killgallon is a member of Financial Planning Association (FPA) and abides by their code of professional conduct and ethics.

Kellie Killgallon

Numero Wealth

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Authorisations

Kellie Killgallon is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & 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; and
- Standard Margin Lending Facility

Numero Wealth Advice Fees and Charges

Kellie Killgallon will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Kellie's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.

Kellie provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

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

Other Benefits Kellie May Receive

From time to time Kellie 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.

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