Financial Adviser Profile

Overview

Tim is a Director of CDG Wealth and a highly qualified Financial Advisor who specialises in providing personalised strategic and investment advice with a focus on delivering solutions that add real value to clients.

Tim has worked in the Financial Planning industry for 9 years and has a broad range of experience gained from working in boutique advisory firms and also in a national Private Wealth institution.

He is passionate about engaging with clients in a transparent and consultative manner and enjoys demystifying complex areas, enabling his clients to take advantage of market-leading strategies and solutions.

Tim's relationship-driven approach allows him to build long-term meaningful relationships with clients and assist them in attaining their financial and lifestyle goals.

Tim is a Sub-Authorised Representative of CDG Wealth Pty Ltd, Corporate Authorised Representative No. 1243665. Authorised Representative No. 1001695.

Qualifications

Tim holds a Bachelor of Commerce along with a Graduate Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Tim is a CFP® member of the Financial Planning Association of Australia (FPA) and a SSA™ member of the SMSF Association and abides by their code of professional conduct and ethics.

Authorisations

Tim 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; and
- Superannuation.

Tim Chisholm

CDG Wealth

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Financial Adviser Profile

CDG WEALTH

CDG Wealth Advice Fees and Charges

Tim Chisholm 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.

Tim's hourly rate for Financial Services is $330 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

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

Other Benefits Tim May Receive

From time to time Tim 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.

Capstone FINANCIAL PLANNING

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