Financial Adviser Profile

Overview

Domenic Coppola

I have worked as an accountant for over 20 years in accounting firms and financial planning firms. I have specialised in SMSF, SAF and Industry funds. More recently I have been advising family businesses holistically and strategically.

At CDG Wealth we seek to provide clients with the tools and advise to achieve their long term retirement and investment goals, while encompassing family goals.

Domenic Coppola is a Sub-Authorised Representative of CDG Wealth Pty Ltd, Corporate Authorised Representative No. 1243665. Authorised Representative No. 1243942.

Qualifications

Domenic Coppola holds a Bachelor of Commerce (Accounting and Finance) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Domenic Coppola is a member of CPA Australia and abides by their code of professional conduct and ethics and holds a Public Practice Certificate. A Registered Tax Agent and Registered SMSF Auditor with ASIC.

Authorisations

Domenic is authorised to:

- provide financial product advice on self-managed superannuation funds;
- arrange to deal in an interest in a self-managed superannuation fund;
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
  - making a recommendation that the person establish a self-managed superannuation fund; or
  - providing advice to the person on contributions or pensions under a superannuation product;
- provide class of product advice on the following:
  - superannuation products;
  - basic deposit products.

Domenic Coppola

CDG Wealth

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CDG Wealth Advice Fees and Charges

Domenic Coppola may 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.

Domenic fee for the preparation of 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.

Where financial planning advice fees are payable, Capstone Financial Planning will receive all revenue in the first instance.

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. Domenic 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 Domenic 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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