

FINANCIAL SERVICES GUIDE

Authorised for distribution by Forrest Private Wealth Management Pty Ltd

(FSG: 1st of July 2021, Version: 1.5)

Before seeking our advice, you probably have several questions you would like to ask about Forrest Private Wealth Management Pty Ltd. You have the right to ask us about our charges, the type of advice we will give you and what you can do if you have a complaint about our services. Key information is set out to answer the questions below. If you need more information or clarification, please ask us.

Why am I receiving this document?

This Financial Services Guide (FSG) is an important document that may help you decide whether to use the services that we* offer. It contains information about:

- Forrest Private Wealth Management Pty Ltd
- Forrest Private Wealth Pty Ltd and Your Financial Planner
- The services we offer and their cost
- Any conflicts of interest which may impact the services
- How we are remunerated
- How we deal with complaints if you are not satisfied with our services.

When we provide you with financial planning services you may receive:

- A Statement of Advice (SoA) or Record of Advice (RoA) which documents the advice we provide to you.
- A Product Disclosure Statement (PDS) which explains the products we have recommended.

** In this document 'we' refers to Forrest Private Wealth (Forrest Private Wealth Pty Ltd) and Your Financial Planner.*

Forrest Private Wealth Management Pty Ltd

Forrest Private Wealth Management Pty Ltd holds an Australian Financial Services Licence (492712) which has been issued by the Australian Securities and Investments Commission (ASIC).

Forrest Private Wealth Management is required to comply with the obligations of the Corporations Act and

the conditions of its licence. This includes the need to have adequate compensation arrangements in place with a Professional Indemnity insurer for the financial services that it and its representatives provide.

Forrest Private Wealth and Your Financial Planner

Forrest Private Wealth has been appointed as a Corporate Authorised Representative of Forrest Private Wealth Management.

Peter Stevens is a Director of Forrest Private Wealth Management. Michael Bower and Jerry Lin are Authorised Representatives of Forrest Private Wealth Management.

We act on behalf of Forrest Private Wealth Management who is responsible for the services that we provide.

Forrest Private Wealth Pty Ltd:	ASIC No: 1251250
Peter Stevens:	ASIC No: 249783
Michael Bower:	ASIC No: 282997
Jerry Lin:	ASIC No: 1001273

For more information on each person above, please visit our website www.forrestprivatewealth.com

What services do we provide?

We are authorised to provide personal advice and dealing services in the following areas:

- Superannuation advice (including Self-Managed Superannuation Fund 'SMSF' advice)
- Financial Planning strategies
- Retirement Planning advice and strategies
- Social Security advice
- Portfolio Management advice
- Risk Management advice (includes both Personal and Business Insurance advice)
- Buying and Selling direct shares (securities)
- Managed investments
- Margin lending advice.