Financial Adviser Profile

Overview

Phil is a Principal of AWT Financial Services since 2016. He commenced his professional career as an analyst in the audit division of Deloitte, one of the largest global services providers, he later worked as a corporate accountant at Barrick Gold.

In 2007, he entered the financial services industry at Insight Financial Partners as a financial adviser where he advised clients from 2007 - 2016; he was a Director and Shareholder in the company from 2010 - 2013.

Phil specialises in covering various aspects of personal financial planning including investments, retirement planning and risk management. He works with clients from a wide range of backgrounds and provides strategies that are suited to their circumstances. He educates and assists clients in making informed financial decisions and, as a CPA, Phil has a strong tax background.

Phil attained a Bachelor of Business in Accounting and Finance from ECU in 2004 and he is a Certified Practicing Accountant (CPA) with Financial Planning Specialist (CPA/FPS) accreditation.

Philippe Bossert is a Sub-Authorised Representative of AWT Financial Services Pty Ltd, Corporate Authorised Representative No. 469578. Authorised Representative No. 320029.

Qualifications

Phil holds a Diploma of Financial Planning and meets the competency requirements under ASIC’s Regulatory Guide RG 146.

Professional Memberships

Phil is a member of CPA Australia and abides by their code of professional conduct and ethics.

Authorisations

Phil 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;
- Securities; and
- Standard Margin Lending Facility.

Philippe Bossert

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AWT Financial Services Advice Fees and Charges

Phil 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.

Phil'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.

Phil provides the option of ongoing reporting and advisory services. This fee is a fixed fee or a % p.a. of the value of your holding incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Phil'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.

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

Other Benefits Phil May Receive

From time to time Phil 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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