Adviser profile

Graham Mutton

Authorised Representative No. 259707

Trelaughney Pty Limited

Corporate Authorised Representative No. 344068

Your adviser

Contact details

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Profile

Trelaughney Pty Limited has commenced trading as a Corporate Authorised Representative in January 2010 due in response to the growth of the practice.

Graham Mutton has been individually authorised (Representative Number 259707) to provide financial product advise and deal in all of the below mentioned categories as a Principal of Trelaughney Pty Limited on behalf of Aon Hewitt Financial Advice Limited.

Experience

Graham has had a keen interest in the finance industry for approximately 10 years. This interest led him to read widely on this topic, source information from the Internet, network with consultants, participate in workshops, information sessions and study. What initially started out as an interest has developed into a passion and in 2001 he turned this passion into his career.

Qualifications

Advanced Diploma of Financial Planning

Diploma of Financial Planning

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Authorisations

Australian Financial Services License

Graham Mutton is authorised to provide financial product advice and deal in the following:

i. deposit and payment products limited to:
   a. basic deposit products;
   b. deposit products other than basic deposit products;
ii. life products including:
   a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
   b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
iii. securities;
iv. interest in managed investment schemes including investor directed portfolio services;
v. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997);
vi. superannuation

Fees and charges

Initial consultation

Free of charge

Advice preparation

Completion of needs analysis: Free

Advice preparation: Minimum $550 up to a maximum of $5,500.

The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required.

Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

Implementation

- Up to 3% for up to $100,000
- Up to 2% from $100,001 to $250,000
- Up to 1% for any amount over $250,001

This fee may be paid by cheque or collected from the investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review service

A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 1.1% or $550.

Consulting fees

$220 per hour
For any other service you require that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Note: All fees and charges quoted are inclusive of GST.