

Financial Services Guide – Part 2

FSG Part 2 contains information specific to your adviser and should be read together with FSG Part 1.

Merit Wealth has authorised your adviser to distribute the FSG.

Who is providing the financial services?

Your Financial Adviser is Monica Tatton

Monica is an Authorised Representative of Merit Wealth and is authorised by Merit Wealth to provide the financial services described in this FSG.

Monica's Authorised Representative number is 336496

What experience does your financial planner have?

Monica has been working in the financial services industry since 2009. Monica opened her own public practice in 2004 and previous to that she worked in numerous Accounting Financial Planning Firms for 6 years. Monica completed the Professional Year qualified with the Institute of Chartered Accountants in 2002.

What qualifications and professional memberships does your adviser have?

- Diploma of Financial Services (Financial Planning)
- Tax Agents Certificate
- Certificate of Membership to Institute of Chartered Accountants
- Bachelor of Commerce (Accounting)

Does your adviser have any associations or relationships?

Monica is a director and employee of Pinnacle Accounting & Financial Services Pty Ltd, ABN 66 002 153 806 which is an authorised representative of Merit Wealth Pty Ltd ABN 89 125 557 002. All Fees and commissions are paid to Pinnacle Accounting & Financial Services Pty Ltd.

How will your financial adviser be paid for the services provided?

All fees and commissions disclosed in the FSG which are attributed to the services provided to you by your adviser are paid to Merit Wealth. Merit Wealth will pay up to 100% of those fees and commissions to Pinnacle Accounting & Financial Services Pty Ltd for distribution.

Pinnacle Accounting & Financial Services may pass on up to 100% of those fees and commission to Monica Tatton.

How can you contact your financial adviser?

Monica Tatton	Phone:	02 9686 8166
Merit Wealth Pty Ltd	Fax:	02 9686 6534
Pinnacle Accounting & Financial Services	Mobile:	0414 324 365
Suite 18	Email:	monicat@mtwo.net.au
9 Seven Hills Road		
Baulkham Hills NSW 2153		

Merit Wealth

Level 2, 115 Pitt Street
Sydney NSW 2000

Tel 1300 785 611
Fax 02 8916 4261

Email contactus@meritwealth.com.au
Web www.meritwealth.com.au

Merit Wealth Pty Limited. ABN: 89 125 557 002 operates under Authorised Financial Services Licence No. 409361

Version 1.4, 1 July 2013