PILOT WEALTH Management

KEVIN BLACKET

ADVISER PROFILE

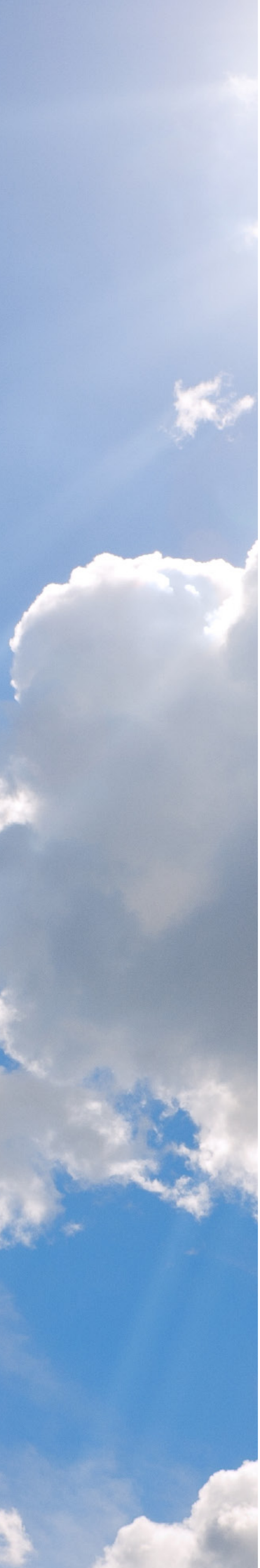
Version 9 – 10th June 2019

CONTACT US

P 08-7200-1748 | F 08-8238-3400 | W https://www.pilotwealth.com.au

Address: 283-287 Sir Donald Bradman Drive Brooklyn Park SA 5032

Pilot Wealth Management Pty Ltd ABN 68 150 457 560, Australian Financial Services Licensee (No 410134)



ADVISER PROFILE

This Adviser Profile forms the second part of the Pilot Wealth Management Financial Services Guide.

This Part 2 provides important information about my employer and I and must be read in conjunction with Part 1.

AM I AUTHORISED TO PROVIDE FINANCIAL SERVICES?

Yes. I am an Authorised Employee of Pilot Wealth Management Pty Ltd and my ASIC identification number is 000245820.

WHAT AREAS AM I AUTHORISED TO ADVISE ON?

I am authorised by Pilot Wealth Management to provide financial services including advice or services in the following areas:

RANGE OF SERVICES

- Deposit products
- Government debentures, stocks or bonds
- Investment life insurance products
- Life risk insurance products
- Managed investment schemes
- Retirement savings accounts
- Securities (shares)
- Standard margin lending facilities and
- Superannuation

In addition to the services listed on page 3 of the FSG, are there any services I am not authorised by Pilot Wealth Management to provide?

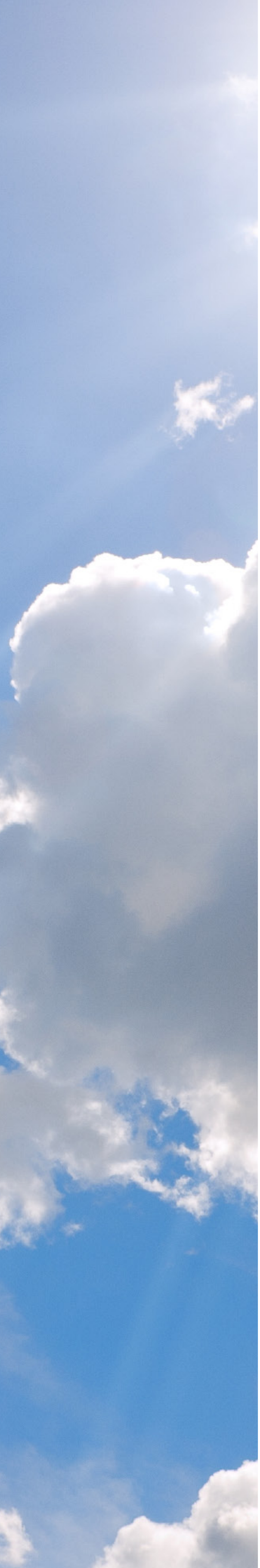
- Neither I nor Pilot Wealth Management are authorised to provide consumer credit services; this includes Mortgage Broking.

WHAT ARE MY EDUCATIONAL QUALIFICATIONS AND EXPERIENCE?

I have the following qualifications:

- Certificate in Financial Markets (FINSIA)
- Diploma of Financial Planning
- Certified Financial Planner

I have 39 years' experience in the Financial Services Industry including over 26 years as a Financial Planner.



HOW AM I PAID?

Remuneration – Salary

I receive a salary as an employee of Pilot Wealth Management. I may also receive a performance bonus which is reliant upon a range of criteria including compliance, education, customer experience and revenue targets. My family members and I are also beneficiaries of the Pilot Wealth Trust (shareholder of Pilot Wealth Management Pty Ltd) and may receive a share of company profits distributed via the trust.

WHAT AMOUNTS DO MY EMPLOYER AND OTHER RELATED ENTITIES RECEIVE?

All fees, commissions and incentives are received by Pilot Wealth Management.

DO I PROVIDE REFERRALS FOR CERTAIN SERVICES OR RECEIVE REFERRALS FROM OTHER PARTIES? IF SO, WHAT BENEFIT DO I RECEIVE FROM THESE REFERRALS?

Clients may be referred to or from businesses Flexible Lending Solutions Pty Ltd (loan broking) from whom we may be paid financial incentives including up to 30% of the upfront Lender's commission payment and up to 30% of the Lender's ongoing commission payments, and Grant Edwards (mobile Wills Service) from whom we are not paid financial incentives.

I CONDUCT MY FINANCIAL PLANNING ACTIVITIES UNDER THE REGISTERED NAME OF PILOT WEALTH MANAGEMENT PTY LTD.

If you would like to make an appointment to discuss your financial needs and objectives in more detail, please don't hesitate to contact me.

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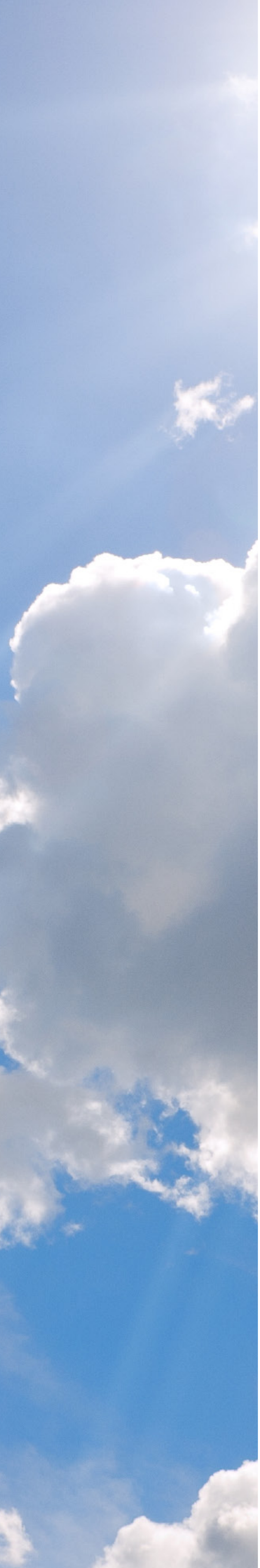


CONFIRMATION FORM

Acknowledgements – Client Copy

I/We acknowledge that I was/we were provided with the Pilot Wealth Management Pty Ltd, Financial Services Guide (Version 9 – 10th June 2019) and Adviser Profile (Version 9 – 10th June 2019) on:

Date: ______________________________

Client Name: ______________________________

Client Signature: ______________________ Date received: ______________

Client Name: ______________________________

Client Signature: ______________________ Date received: ______________

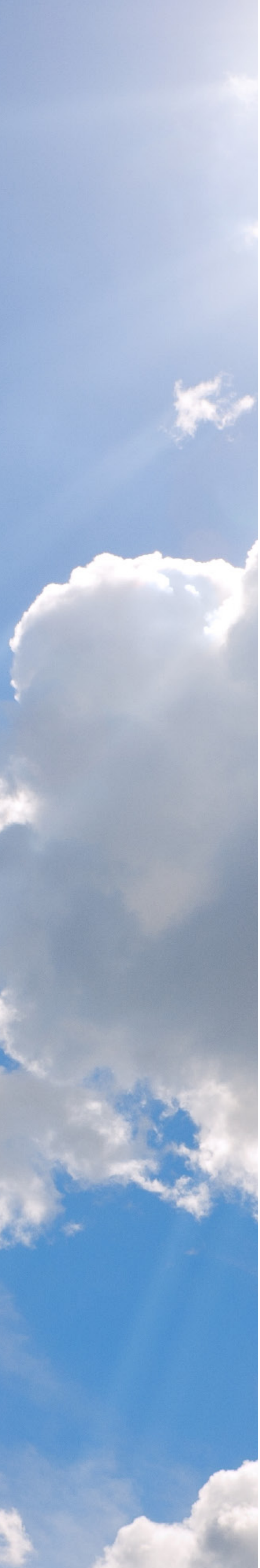
OR complete as follows if FSG is mailed to Client(s):

I confirm that I sent a copy of the Pilot Wealth Management Pty Ltd, Financial Services Guide (Version 9 – 10th June 2019) and Adviser Profile dated (Version 9 – 10th June 2019):

Sent to (Client Name(s)): ______________________________

Sent on (Date): ______________________

Sent by (Name): ______________________________



CONFIRMATION FORM

Acknowledgements – Adviser Copy to be retained on client file

DETACH COPY FOR FILE

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