

ADVISER PROFILE

This adviser profile should be read with the Financial Services Guide.

Dylan Williams (001307276)

Dylan is passionate about ensuring that clients receive the right advice for their individual circumstances to achieve their financial goals. To assist in this goal, he employs a holistic view when providing financial advice to ensure the service he provides is more personal and tailored to a client's financial situation and relevant goals. Dylan has training across a range of different advice products and services but specialises in Personal Insurance, Superannuation Products, and Aged Care.

Dylan has worked alongside our Senior Advisers at Cotton Tree Financial Services for a number of years and has a strong understanding of client care. He is passionate about educating clients to help them understand the advice they receive. Dylan believes clients should fully understand the advice they receive so they are able to make informed and confident decisions when dealing with important topics like retirement planning and the financial security of you and your family. He has a passion for client engagement and encouraging clients to play an active role in the success of their financial future.

Qualifications & Memberships

Dylan has a Bachelor of Business with majors in Financial Planning and Accounting from the Queensland University of Technology. He has also completed the FASEA Financial Adviser exam, is an Accredited Aged Care professional, and is a member of the Financial Advice Association Australia (FAAA) #409032.

Authorisations

Dylan is authorised to provide advice and deal (under supervision of a Senior Adviser) in the following financial products

- Provide Financial product advice, Deposit and payment Products
- Life Products, Investment Life Insurance Products and Life risk Insurance products
- Retirement Savings Account Products
- Securities
- Superannuation
- Managed Investment Schemes
- Aged Care



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FQAA FINANCIAL ADVICE
ASSOCIATION
AUSTRALIA

PROVISIONAL PLANNER

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**ACCREDITED
AGED CARE
PROFESSIONAL**

Dylan is currently undertaking a Professional Year of work and training in accordance with subsection 921B (4) of the Corporations Act 2001. His supervisor during this period is Hayden White (001001437), a Senior Financial Adviser and employee of Poole & Partners Investment Services. Hayden will be responsible for any advice provided by Dylan during that time.

Dylan is authorised to provide financial advice, conduct client meetings and prepare and implement advice documents only under the supervision of a Senior Financial Adviser.

How Dylan is Paid

Dylan is a salaried employee of Poole & Partners Investment Services Pty Ltd (PPI). His remuneration is not aligned to the recommendations of any particular investment or life insurance product or product issuer.

Advice Fees and Charges

Fees and charges are outlined in the FSG under “Our Fees” and will be disclosed in the advice document at the time of providing advice.

Service Standards

Dylan works closely with Accountants to service insurance, superannuation needs and provide specialist advice regarding structure/ownership and product/policy definitions options.

The initial and ongoing service is a priority for all clients and something he prides himself on. An ongoing annual review process is conducted for all insurance portfolios and to also ensure his clients situation is in line with their present level of cover. All claim requirements are dealt with by Dylan, where he deals with the insurance company on the client’s behalf and handle all administration requirements. By handling claims internally with our Claims Management Service, it takes the time and stress off clients to ensure they can concentrate on getting better.

Dylan will complete an annual review to reassess a client’s personal situation and ensure that client’s bespoke portfolio is still aligned to their needs. This is in addition to regular portfolio monitoring and reporting. All advice provided is impartial and in clients best interest as Dylan and Poole & Partners Investments Services (PPI) are not aligned with any insurance companies or financial institutions.