About Your Adviser

Alexander McWilliams

Authorised Representative Number 0011266231
Adviser Profile | 1 April 2024

50 CAVILL, SURFERS PARADISE QLD 4217

0481 464 712 | 1300 219 211

alex@truewealth.com.au

truewealth.com.au

ABN 86 635 905 243

About Me

Alex is a highly motivated and accomplished individual with a diverse skill set and a passion for personal and professional growth. He holds a Diploma of Financial Planning, a Bachelor of Business in Real Estate & Property Development, and a Bachelor of Business in Marketing, providing him with a strong foundation in the financial and property markets, as well as a talent for marketing and promotion. In addition, Alex is a Justice of the Peace, demonstrating his commitment to serving his community and upholding the law.

In his leisure time, Alex enjoys staying active through tennis and fitness activities, as well as exploring new cultures through travel. His diverse interests and experiences have given him a broad world-view and a deep appreciation for diversity. Whether in his professional or personal life, Alex is always looking for new challenges and opportunities for growth and development.

Authorisations

I am authorised in the following financial services and products:

- Superannuation
- Pensions and Annuities
- Self-Managed Superannuation Funds
- Cash and Term Deposits
- Managed Investments
- Listed Securities (shares & other products)
- Investment Bonds
- Life Insurance
- Aged Care
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up to	
Advice Consult Preparation of Advice Implementation of Advice	4.4% of your portfolio balance capped at $6,600	
Remuneration	**Initial**	**Per Annum**
Adviser Service Fee (asset based)*	-	1.65% capped at $5,500
Contribution Fee*	-	-
Insurance Commission*	66%	35%

*Based on a % of funds invested or insurance premiums

^Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020 commission of up to 130% will apply to additional cover.

For example, a 1% Adviser Service Fee based on a $200,000 investment would equal a $2,000 fee payable.

Benefits, interests and associations

The financial planning business and I do not have related parties, shareholdings or referral arrangements that may influence my advice. Neither the business or I pay or receive referral fees.