financial advice, made simple.

About Your Adviser

Ash McAuliffe

Authorised Representative Number 000249679

Adviser Profile | 1 April 2024

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About Me

Ash's motivation for his work comes from seeing ordinary people achieve a sense of financial freedom. Following in his father's footsteps as a Financial Adviser, Ash has been helping Australians achieve their financial goals for his entire career. Ash has a very broad range of experience, having advised clients from Business, AgriBusiness and Private Banks, as well as large and small private firms and family offices. Ash has also held senior leadership roles with large advice businesses and superannuation funds. From an education perspective, Ash holds a Master's Degree in Commerce as well as an MBA and is actively involved in tertiary education, having taught Financial Planning students at several of Australia's leading universities.

Ash has three young children so when he is not advising clients he is usually driving to or from Soccer, Basketball, Dancing or Tennis. He also likes to squeeze a Mountain Bike ride in when he can.

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 & Discretionary Bonus

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.