

Financial Adviser Profile



Overview

Jack Wyer has a Bachelor's Degree in Business, majoring in Financial Planning, Jack has demonstrated high achievement, receiving merit awards in both 2021 and 2022. Jack's passion for helping others and his desire to see others succeed financially have been the driving forces behind his chosen career pathway.

Jack specialises in Pre-Retirement and Retirement Planning, maximising Centrelink Entitlements, Building and Protecting Wealth and Retirement Income Solutions.

Jack strives to build strong relationships with clients, and tailor a financial pathway to each client's goals and aspirations.

Alongside his financial planning endeavours, Jack finds joy in spending quality time with friends and family and wants to visit new countries along the way. Jack is also an avid Soccer player, actively playing for a local team. When it comes to supporting a team, Jack goes for Tottenham in the English Premier League.

Jack Wyer is a Sub-Authorised Representative of APG Financial Intelligence Pty Ltd (T/A Verity Wealth Solutions), Corporate Authorised Representative No. 468047. Authorised Representative No. 1307967.

Qualifications

Jack Wyer holds a Bachelor of Business (Financial Planning) and meets the competency requirements under ASICs Regulatory Guide RG 146.

Authorisations

Jack Wyer is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation
- Securities

Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.



Jack Wyer

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APG Financial Intelligence Pty Ltd Advice Fees and Charges

Jack Wyer will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Jack's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.

Jack provides the option of ongoing advisory services. Fees are fixed dollar and costs depend on the complexity involved and the time taken to manage individuals' situations. You will be notified of the cost involved prior to the commencement of any ongoing services.

Verity Wealth Solutions pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Jack Wyer is a salaried employee of Verity Wealth Solutions and will receive a salary/benefit from this company.

Other Benefits Jack May Receive

From time to time Jack Wyer may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than \$300. A register listing the details of any non-cash benefits between \$100 and \$300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

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