

Adviser Profile

SODA WEALTH

Overview

Having worked as a Financial Planner since 2003, I continue to be passionate about helping clients on the journey to achieving their financial goals. At SODA WEALTH, our aim is to help guide every individual client to realise their financial potential so that they can live their lives. We specialise in a range of advice areas from personal insurance to help protect you and your loved ones, to planning for your retirement, dealing with Centrelink and Aged Care.

Feel free to come and have a no obligation chat to see what we can do for you.

Daniel Leow is a Sub-Authorised Representative of SODA WEALTH ADVICE PTY LTD (T/A SODA WEALTH), Corporate Authorised Representative No. 1280279. Authorised Representative No. 1003847.

Qualifications

Daniel holds a Bachelor of Business (Financial Planning) and Diploma of Finance and Mortgage Broking Management; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Daniel Leow is a member of the Financial Advice Association Australia (FAAA) and the Finance Brokers Association of Australasia (FBAA); and abides by their codes of professional conduct and ethics.

Authorisations

Daniel Leow 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.



Daniel Leow

SODA WEALTH

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SODA WEALTH Advice Fees and Charges

Daniel will be paid by Financial Planning Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you it is charged.

Daniel's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$4,400 and \$5,500 incl. GST.

Daniel provides the option of ongoing reporting and advisory services. This may be a fixed fee, typically between \$4,400 and \$11,000 incl. GST. The fee will vary depending on the complexity of the service to be provided.

SODA WEALTH ADVICE PTY LTD pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Daniel Leow is a Director of SODA WEALTH ADVICE PTY LTD and will receive a salary/benefit from this company.

Other Benefits Daniel May Receive

From time to time Daniel 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.

SODA WEALTH ADVICE PTY LTD has an interest in SODA WEALTH PTY LTD which provides mortgage broking services to its clients; and may receive dividends, payments or other non-monetary benefits as a result of this interest.