



Adviser Profile

December 2023



Value Wealth Management

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This document is the Adviser Profile of the Financial Services Guide (FSG) dated 6th December 2023 and should be read together with the FSG. I am sub-authorised to provide the financial services described in the FSG by Value Wealth Management Pty Ltd CAR 1297653 (Value Wealth Management).

Who is your Financial Adviser?

Your Financial Adviser is Tony Boniello. In this document, the terms, 'he', 'his', 'us', 'we' and 'our' refers to Value Wealth Management. The term 'licensee' refers to Adviser Services Pty Ltd. Tony's Authorised Representative number is 242646.

What Experience, Qualifications and Professional Memberships does your Financial Adviser have?

Tony has worked in the financial services industry as a Financial Planner since 1990. He worked with MLC and Garvan Financial Planning until March 2005, at which point he joined Retire Invest until September 2018. Since September 2018 to May 2022, he worked as Senior Adviser and Proprietor of Momentum Wealth Management. He is now authorised to operate under the Adviser Services Pty Ltd AFSL, trading as Value Wealth Management Pty Ltd.

He has a Diploma in Financial Planning, along with an industry leading designation of Certified Financial Planner (CFP). This distinction is only awarded to individuals who have met rigorous competency, ethics,

and professional practice standards. In order to retain their right to use the CFP mark, CFP professionals must satisfy ongoing renewal requirements including continuing professional development. He is also a member of the Financial Planning Association of Australia (FPA) and bound by its Professional Code of Conduct and Ethics. He has also successfully completed the Ethics and Exam components of FASEA's adviser requirements in November 2020.

With his qualifications and experience, he is well equipped to deliver holistic financial planning advice and help clients achieve their financial goals and objectives, along their journey.

Statement of Non- Independence

Tony Boniello and Value Wealth Management are not able to describe itself/themselves as being independent, Here's why. The law makes it very difficult for most advisers to say they are independent, unbiased, or impartial, even if they are not in any way linked to a financial product provider, as is the case with Value Wealth Management Pty Ltd. We are not permitted to use the terms "Independent", "unbiased", "impartial" to describe our advisory work. Being paid by way of commission to offset the cost of providing our clients life insurance advice is the most likely reason for this. So, although we always put your interests before ours when giving advice we cannot (by law) call ourselves independent, unbiased or impartial.



Does your Financial Adviser have any associations or relationships?

Tony has an association with Value Wealth Management as a director. Fees and commissions are paid to Value Wealth Management by Adviser Services for distribution to Tony.

What areas is your Financial Adviser authorised to provide advice on?

Tony is authorised by Value Wealth Management to provide financial services, including advice or services, in the following areas:

- Superannuation
- Retirement Planning
- Investments including savings plans
- Personal insurance
- Budget and cash flow planning
- Debt management
- Redundancy advice
- Centrelink
- Self-managed superannuation
- Portfolio review
- Estate planning
- Ongoing advisory services
- Referrals to specialists (eg. Accountants, solicitors)

Tony is authorised to deal in the following products:

- Deposit and Payment Products – Basic Deposit
- Government Debentures, Stocks or Bonds
- Investment Life Insurance Products
- Life Risk Insurance Products
- Managed Investment Schemes (including investor directed portfolio services)
- Retirement Savings Account Products
- Securities
- Standard margin lending facility
- Superannuation

Please ask him if you would like a referral for any other services. If he receives a specific fee for this referral, it will be disclosed in an advice document such as a Statement of Advice ('SOA'), if he provides you with personal advice.