

Financial Adviser Profile



Overview

Bronwyn has over 20 years' experience in the Financial Services and Accounting industry. Bronwyn's experience and professional expertise enables her to offer a unique and highly skilled perspective to assist you with your business and personal requirements.

Bronwyn is passionate, professional and understands the importance of planning for the future, building wealth outside your business, sharing the journey with you during your working life into retirement and then assisting you with your succession plan. Bronwyn enjoys meeting with clients in their own environment, understanding their businesses and appreciates their entrepreneurship, working together to build and develop their goals every step of the way.

Bronwyn Holzheimer is a Sub-Authorised Representative of ENVFP Pty Ltd trading as UNIQsol Wealth, Corporate Authorised Representative No. 1265921. Authorised Representative No. 253547.

Qualifications

Bronwyn is a Certified Practising Accountant(CPA), a Certified Financial Planner®(CFP) and holds a Bachelor of Business(Accounting). In addition, she is a Justice of the Peace and meets the competency requirements under ASIC's Regulatory Guide RG 146. Bronwyn has passed the FASEA exam.

Professional Memberships

Bronwyn is a member of CPA Australia, the Financial Planning Association of Australia, the Tax Practitioners Board and abides by their code of professional conduct and ethics.

Authorisations

Bronwyn is authorised to:

- provide financial product advice on self-managed superannuation funds;
- arrange to deal in an interest in a self-managed superannuation fund;
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
 - making a recommendation that the person establish a self-managed superannuation fund; or
 - providing advice to the person on contributions or pensions under a superannuation product;
- provide class of product advice on the following:
 - superannuation products;
 - securities;
 - simple managed investment schemes;
 - life risk insurance products;
 - basic deposit products.



Bronwyn Holzheimer

UNIQsol Wealth

Suite 8, 10 Liuzzi Street
Pialba QLD 4655

Phone: 07 4192 8900

bronwynh@uniqsol.com.au
www.uniqsol.com.au

Financial Adviser Profile



UNIQsol Wealth Advice Fees and Charges

Bronwyn Holzheimer 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.

Bronwyn's hourly rate for Financial Services is \$385 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Bronwyn'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.

Bronwyn provides the option of ongoing reporting and advisory services. This fee commences at \$3,300p.a. incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services in your Statement of Advice.

Does your Financial Adviser have any associations or relationships?

ENVFP Pty Ltd (the CAR) is an Australian private company which is owned by U6E Pty Ltd trading as UNIQsol and J & VK Investments Pty Ltd as trustee for the Kosmidis Family Trust. Your advisers, Ms Bronwyn Holzheimer is the sole director of U6E Pty Ltd and Mr John Kosmidis is a beneficiary of the Kosmidis Family Trust.

As Ms Bronwyn Holzheimer is a Director and shareholder of U6E Pty Ltd trading as UNIQsol Compliance which provides tax and accounting services, she may be eligible to receive profit at the end of each financial year.

ENVFP Pty Ltd trading as UNIQsol Wealth pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Bronwyn Holzheimer is a Director of ENVFP Pty Ltd trading as UNIQsol Wealth and will receive a salary/benefit from this company.

Other Benefits Adviser May Receive

From time to time Bronwyn 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.

Version 4.0



Level 14, 461 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.