About Your Adviser

Jace Cordell

Authorised Representative No. 1007040

Steel Lake Advisory Services

Newcastle and Lake Financial Planning Pty Ltd

Authorised Representative No. 1007036

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About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 2012 and became an authorised representative of Alliance Wealth Pty Ltd on 28 October 2021.

I have met the FASEA Education Standard and I hold the following qualifications:

- Advanced Diploma of Financial Planning
- Bachelor of Business (Financial Planning)

I hold the following memberships:

- Practitioner Member of the Association of Financial Advisers

I am authorised to provide the following financial services:

Superannuation and Retirement Planning
Personal Superannuation Corporate Superannuation Industry and Public Sector Superannuation Pensions and Annuities Self-Managed Superannuation Centrelink / Veterans' Affairs Assistance
Wealth Creation and Investments
Cash and Term Deposits Investment Bonds Managed Investments Exchange Traded Products Listed Securities (Shares and other products) Margin Lending Gearing
Wealth Protection
Term Life Insurance Total and Permanent Disability (TPD) Insurance Trauma Insurance Income Protection Insurance Business Insurance Insurance Claims Assistance
Other Financial Planning Services
Budgeting and Cashflow Management Debt Management

I am also a registered Tax (Financial) Adviser.

My Remuneration

I am remunerated by:

- Salary plus profit share

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Type of Remuneration	From	To
SoA Preparation Fee	$440	$7,700
Hourly Rate	$330	

Type of Remuneration	Initial	Per Annum
Adviser Service Fee	$440 to $7,700	$2,640 to $10,560
Insurance Commission*	0% to 66%^	0% to 31.13%

* 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.

Benefits, Interests and Associations

The Business, associated entities or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.