Adviser Profile

Matt Lewis

This document forms **Part B** of our Financial Services Guide and must be read together with **Part A**.

About Matt Lewis

Matt is an Authorised Representative (AR number 1008494) of SGN Financial Pty Ltd AFSL no. 490523.

Professional Qualifications and Memberships

- Certified Financial Planner Bachelor of Business
- Advanced Diploma in Financial Services (Financial Planning)
- RG146 Compliant (inc. Margin Lending Accreditation)

Matt has been in the financial services industry since 2000 and joined Right Advice Wealth Management and became a director in 2019.

Matt was nominated for the Activam Adviser of the Year award and named one of the top 50 Financial Adviser's with ANZ in 2013.

Advice and services I can provide

Matt Lewis is authorised to provide advice on and deal in the following financial and incidental strategies:

- Financial Planning advice;
- Wealth Accumulation advice;
- Superannuation advice, including self managed superannuation funds;
- Redundancy advice;
- Retirement advice;
- Gearing strategies;
- Cash flow advice;
- Social security benefits advice;
- Aged Care advice (financial planning);
- Life & disability insurance advice; and
- Estate planning services (financial planning).

And the following financial products:

- Deposit and payment products
- 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
- Managed Discretionary Accounts
- Derivatives
- Superannuation (including Self-Managed Super Funds)
- Standard Margin Lending

Matt Lewis is also authorised to provide Tax (Financial) Advice to explain the tax implications of the advice he provides as a Financial Adviser.

Matt Lewis's Contact details:

Address: **G5/6 Waterfront Place, Robina QLD 4226**

Postal: **PO Box 7174, Mt Crosby QLD 4306**

Phone: 0420 677 977

Email: matt.lewis@rawm.com.au

Website: www.rawm.com.au

How am I paid

Matt Lewis is an employee of Right Advice Wealth Management and receives a salary and a potential bonus from Right Advice Wealth Management. Any potential bonus paid is based on meeting individual key performance indicators, compliance-related standards and the overall profitability of our practice.

Matt Lewis is a director of Right Advice Wealth Management. Right Advice Wealth Management distributes company profits to shareholders periodically.

As a director of Right Advice Wealth Management, Matt Lewis may be entitled to receive remuneration from profit share, distributions, dividends and/or director fees.