

Financial Adviser Profile

Overview

Julian has been in the financial planning industry for over 10 years with significant experience working with public sector employees, helping them navigate through the complexities of their defined benefit schemes. Further to this Julian brings a wealth of experience assisting clients with retirement planning and ensuring a smooth, successful transition from a working life to enjoying retirement.

Julian specialises in pre-retirement and retirement planning, personal protection, investment management and self-managed superannuation. He has a passion for helping clients meet their financial goals by developing personalised tailored solutions and believes that a robust financial plan can provide clients with peace of mind.

Born and bred Port Macquarie local, Julian grew here before moving to the city where he completed his studies and established himself in the financial planning industry. It was an easy choice to return to Port, where he brings his professionalism, knowledge and experience in the financial services industry to the Mid North Coast community. When he is not in the office, you might find Julian on the coast walk or enjoying a coffee at his favourite coffee shop

Julian Gillmore is a Sub-Authorised Representative of Evolution Road Wealth Management Pty Ltd, Corporate Authorised Representative No. 1249365. Authorised Representative No. 1004831.

Qualifications

Julian Gillmore holds the following qualifications and meets the competency requirements under ASIC's Regulatory Guide RG 146.

- Bachelor of Commerce (University of Newcastle)
- Diploma of Financial Planning (Kaplan)

Authorisations

Julian Gillmore is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Superannuation;
- Self Managed Superannuation Funds;
- Securities



Julian Gillmore

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Evolution Road Wealth Management Advice Fees and Charges

Julian Gillmore 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.

The 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.

The option of ongoing reporting and advisory services will be offered. A minimum subscription fee of \$3,300 per annum applies. You will be notified of the cost involved prior to the commencement of any ongoing services.

Evolution Road Wealth Management 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. Julian Gillmore is a salaried employee of Evolution Road Wealth Management and will receive a salary from this company.

Other Benefits Adviser May Receive

From time to time Julian Gillmore 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.