FINANCIAL SERVICES GUIDE

Part 2 Adviser Profile – Chace Baulch

Version 7 | 01 May 2024

ADVISER PROFILE

Dated 1 May 2024

Adviser Profile contains the following sections:

- About Your Adviser (Section 1);
- The Services I Provide (Section 2);
- Adviser Remuneration (Section 3);
- Contact and Acknowledgment (Section 4).

This document is the Adviser Profile of the Financial Services Guide (FSG) dated 1 July 2023 and should be read together with Part 1. Part 2 sets out specific details about me as an Authorised Representative of Endure Wealth Pty Ltd.

I am authorised by Endure Wealth Pty Ltd to provide the financial services described in Part 1 and Part 2 (Adviser Profile) of the FSG. I have also been authorised by Endure Wealth Pty Ltd to distribute this FSG.

Endure Wealth Pty Ltd
ABN 87 632 221 713 holder of
Australian Financial Services Licence No. 516435
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139 Sturt Street
Townsville QLD 4810
Ph: 07 4760 5900
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Email: info@endurewealth.com.au

SECTION 1

ABOUT YOUR ADVISER

WHO IS YOUR FINANCIAL ADVISER?

Your Financial Adviser is Chace Baulch and Carey Financial Pty Ltd.

In this document, the terms 'I', 'me', 'us', 'we' and 'our' refer to Chace Baulch and Carey Financial Pty Ltd. The term 'Representatives' refers generally to Endure Wealth Pty Ltd's Authorised Representatives.

My Authorised Representative number is 1271598 and the Corporate Authorised Representative number is 345331

WHAT EXPERIENCE DOES YOUR FINANCIAL ADVISER HAVE?

I entered the Financial Services industry in 2008 and became a Financial Adviser in 2018.
I have developed strong communication, relationship and networking skills over my working life and as such am able to relate easily to people of all levels and backgrounds.

WHAT QUALIFICATIONS AND PROFESSIONAL MEMBERSHIPS DOES YOUR FINANCIAL ADVISER HAVE?

I hold a Graduate Diploma of Financial Planning. I have also completed the Kaplan Self Managed Superannuation Funds, Aged Care and Margin Lending Specialist courses.

DOES YOUR FINANCIAL ADVISER HAVE ANY ASSOCIATIONS OR RELATIONSHIPS?

I have an association with Carey Financial Pty Ltd (ABN 62 082 511 493) as an employee. Fees and commissions are paid to Carey Financial Pty for distribution to me. Carey Financial Pty Ltd is a Corporate Authorised Representative (345331) of Endure Wealth Pty Ltd.

SECTION 2

THE SERVICES I PROVIDE

WHAT AREAS IS YOUR FINANCIAL ADVISER AUTHORISED TO PROVIDE ADVICE ON?

I am authorised by Endure Wealth Pty Ltd to provide general and personal advice and deal in financial products and financial services including advice or services in the following areas:

- Deposit products;
- Government debentures, stocks or bonds;
- Life investment and life risk products;
- Managed investment schemes including investor directed portfolio services;
- Retirement savings account products;
- Securities (e.g. shares); and
- Superannuation products
- Self-Managed Super Funds
- Standard margin lending facilities
- Aged Care

ARE THERE ANY SERVICES YOUR FINANCIAL ADVISER IS NOT AUTHORISED TO PROVIDE?

I am not authorised by Endure Wealth Pty Ltd to provide advice or services in the following areas:

- MDA services
- Derivatives

SECTION 3

ADVISER REMUNERATION

HOW WILL YOUR FINANCIAL ADVISER BE PAID FOR THE SERVICES PROVIDED?

All fees and commissions disclosed in this FSG which are attributed to the services provided to you by me are paid to Endure Wealth Pty Ltd.

Endure Wealth Pty Ltd will pay up to 100% of those fees and commissions to Carey Financial Pty Ltd.

I receive a salary as an employee of Carey Financial Pty Ltd. I may also receive a performance bonus which may be based on certain performance criteria, such as the revenue I generate for Carey Financial Pty Ltd, as well as a number of factors including qualitative factors such as audit reports and client feedback.

WHAT AMOUNTS DO MY EMPLOYER AND OTHER RELATED ENTITIES RECEIVE FOR FINANCIAL SERVICES?

Carey Financial Pty Ltd receives 100% of fees and commissions. The directors of Carey Financial Pty Ltd have a profit share arrangement to distribute company profits annually to shareholders and staff.

REFERRAL PAYMENTS?

Neither Carey Financial Pty Ltd, nor I, will receive a payment for referring you to an external specialist such as an accountant, mortgage broker or solicitor and where an external specialist refers you to us we will not make a payment to them for the referral.

SECTION 4

CONTACT

HOW YOU CAN CONTACT YOUR FINANCIAL ADVISER

Your Financial Adviser:

Chace Baulch

Practice details:

Carey Financial Pty Ltd
139 Sturt Street
Townsville Qld 4810

Phone: 07 4760 5900
Fax: 07 4772 7244
Email: chace.baulch@careygroup.com.au
Website: www.careygroup.com.au

ACKNOWLEDGEMENT

I/We acknowledge that I was/we were provided with the Endure Wealth Pty Ltd Financial Services Guide Part 1 dated 1 July 2023 and Part 2 (Adviser Profile) dated 1 May 2024

Client name:			
Client signature:		Date received:	
Client name:			
Client signature:		Date received:	

OR complete as follows if Financial Services Guide is mailed to Client(s):

I confirm that I sent a copy of the Endure Wealth Pty Ltd Financial Services Guide Part 1 dated 1 July 2023 and Part 2 (Adviser Profile) dated 1 May 2024 as follows:

Sent to (Client name(s)):________________________________

Sent on (Date):________________________________

Sent by (Name):________________________________