

Adviser Profile

Damien Basile



This adviser profile forms an essential part of the Financial Service Guide (FSG). The FSG is not complete without it.

Authorised Representative Number:	1004890
Corporate Authorised Representative Number:	1281910
Adviser profile issue date:	19/6/2020
Version:	5.1

Damien Basile is an Authorised Representative of RI Advice Group Pty Ltd (RI Advice Group) ABN 23 001 774 125, AFSL 238429. Damien Basile is proprietor of Tomrie Group Pty Ltd trading as Intergenerational Wealth which is a Corporate Authorised Representative of RI Advice Group.

Qualifications and experience

I have over 12 years' experience within the financial services industry and I am passionate about providing quality advice to my clients, helping them meet their goals and objectives. I hold a Bachelor of Business and a Diploma in Financial Planning. I have recently successfully completed an additional Ethics & Professionalism course and Financial Adviser exam through FASEA.

I specialise in Pre-Retirement & Retirement planning along with Wealth Protection advice. My passion is working with my clients to ensure they meet their retirement goals, ensuring they have sufficient income to live the retirement they deserve. Additionally, I provide advice on creating wealth and protecting wealth in the event of an unforeseen injury or illness.

Personally, I am married and love spending time with my family and friends. I am a keen AFL supporter and enjoy a game of golf on the weekend.

Services offered

I am authorised to provide advice in the following areas:

- Superannuation
- Retirement planning
- Investments, including savings plans
- Personal insurance
- Budget and cash flow planning
- Debt management
- Business insurance
- Centrelink / DVA
- Ownership and structures (e.g. discretionary and family trusts)
- Portfolio review
- Estate planning
- Ongoing advisory services
- Referrals to specialists (eg accountants, solicitors)

Products offered

I am authorised to deal in the following products:

- Deposit and payment products
- Derivatives
- Life investment or life risk products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Securities
- Superannuation

How I am paid

As the licensee, RI Advice Group collects all advice fees and commissions. RI Advice Group then pays the fees and commissions to my Practice as detailed in the Guide under 'How We are Paid'. My Practice pays me out of the fees and commissions it receives from RI Advice Group, by one or more of the methods outlined below.

- **Salary** – I may be paid a salary based on my experience and capability.

At the time of providing advice, we will disclose the amounts that RI Advice Group, the Practice and I receive (if any) as a result of that advice.

Client fee and payment options

Before providing advice, we will agree the fees and payment options with you. The fee you pay will depend on the complexity of your circumstances and the services you require.

Our fees are charged as fee for service.

Fee for service: Fee for service is based on the service we provide. This fee can be determined by:

- An hourly rate.
- A fixed dollar amount.
- A percentage of funds invested (excluding borrowed funds).
- A combination of these methods.

We can invoice you directly for our fee for service. Alternatively, some products allow an adviser service fee to be deducted from the investment balance.

Commissions: I do not receive commissions.

My contact details

Address	Level 1, 6-8 Eddy Street Moonee Ponds VIC 3039 Australia
Phone	0408 580 839