Adviser Profile

Your Questions - Our Answers

Who will be providing the financial services to me?

William Jackson t/as Solutions to Financial Health is Authorised Representative No 347015 acting under authority from Synchron.

Solutions to Financial Health

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Who is my adviser?

Your adviser will be William Jackson who is authorised to act on behalf of Synchron.

William has been working in the financial services industry for over 17 years. During this period, he has held several financial planning and sales roles. He joined OnePath Financial Planning in 2001 and RI Advice Group in 2010.

He has been awarded a Diploma of Financial Services (Financial Planning) and this qualification confirms his competency in all of the required RG146 specialist knowledge areas. With these qualifications and extensive experience, he is well qualified to help his clients to achieve their financial goals.

What kinds of financial services are you authorised to provide me and what kinds of products do those services relate to?

William Jackson is authorised by Synchron to offer you the following services:

Provide financial product advice and to deal in a financial product by arranging for a financial product to be acquired, disposed of, or varied.

William Jackson can provide advice on and deal in the following products:-

- Deposit and Payment Products
- Debentures , Stocks or Bonds issued by a Government
- Life Products, including
- Investment Life Insurance Products
- Life Risk Insurance Products
- Interests in Managed Investment Schemes (incl IDPS)
- Retirement Savings Account Products
- Superannuation

We will only recommend a product or strategy to you after considering its suitability for your individual situation and needs.

We do not provide advice in any other area of insurance or investments but can refer you to a professional who specialises in other areas if requested. Any arrangements you make with the other professional will be strictly between you and that person and neither Synchron nor our Authorised Representative accept any responsibility or liability for the advice given.

Do you receive remuneration, commission, fees or other benefits in relation to providing the financial services to me and how is that commission calculated?

William Jackson will be paid 100% of the brokerage and/or fees received by Synchron minus a fee of 15% for the provisions of professional services from Synchron.

This brokerage is used to provide income after paying for the normal expenses incurred with running a business (eg rent, vehicle, computer, stationery, professional fees etc).

Insurance Monitoring:

Internal databases are maintained detailing client's insurances that were recommended by our Authorised Representative on behalf of Synchron. This does not constitute portfolio monitoring. Portfolios are reviewed on a regular basis, subject to the client's discretion.

Note: This Financial Services Guide (Ver 4 Issue 1, June 2015) is for the sole use by William Jackson only and was prepared on 22nd June 2015, issued with the authority of Synchronised Business Services Pty Ltd t/as Synchron, Australian Financial Services Licence No. 243313 Life Insurance Broker.

This Adviser Profile, together with the Client Receipt page, is Part 2 of our Financial Services Guide and should be read in conjunction with Part 1 as a complete document.