Financial Adviser Profile

Overview

Marc is the director and founder of Acuity Wealth Management. With over a decade of experience in providing financial planning solutions he is passionate about building long-term relationships in an honest and transparent manner.

Marc enjoys being able to educate others in a way that allows them to take greater control over their financial choices, in turn making a meaningful impact to his client's lives. With tailored professional support for your individual circumstances Marc is able to guide you through the technicalities in a straight-forward fashion.

Acuity Wealth Management is a Community Partner of Make-A-Wish Australia. Which means that a portion of all profits and fees charged are paid to Make-A-Wish to create life changing wishes for critically ill children and support them and their families in their times of need.

Marc specialises in and provides comprehensive advice covering:

- Investment and wealth accumulation
- Cash flow and debt management
- Superannuation
- Self Managed Superannuation Funds (SMSF)
- Pre-retirement and retirement planning
- Centrelink
- Wealth protection
- Estate planning
- Aged Care
- Securities

Outside of work Marc is a loving father and husband and loves to get outdoors, be it just in the garden or exploring the world with his family.

Marc is a Sub-Authorised Representative of Acuity Wealth Management Pty Ltd, Corporate Authorised Representative No.1293236. Authorised Representative No. 1004052.

Qualifications

Marc holds a Bachelor of Business majoring in Finance, a Diploma of Financial Services (Financial Planning) an Advanced Diploma of Financial Planning, is an Accredited Listed Products Adviser (ASX), is a Certified Financial Planner®, is an accredited Aged Care Specialist and SMSF Specialist Adviser and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Marc is a member of Financial Planning Association of Australia (FPA) and the SMSF Association of Australia and abides by their code of professional conduct and ethics.

Marc Wierzbicki

CFP® SSA®

Acuity Wealth Management

Level 1, 25 Murray St
Hobart TAS 7000

Postal: PO Box 688
North Hobart TAS 7002

Mobile: 0459 821 964

Email:
marc.wierzbicki@acuitywm.com.au

Website:
www.acuitywm.com.au

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Authorisations

Marc 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 - All; and
- Securities.

Acuity Wealth Management Advice Fees and Charges

Marc 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.

Marc's 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.

Marc provides the option of ongoing reporting and advisory services. Fees are fixed dollar, and costs depend on the complexity involved and the time taken to manage services provided. You will be notified of the cost involved prior to the commencement of any ongoing services.

Acuity Wealth Management pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Marc is a Director of Acuity Wealth Management and will receive a salary/benefit from this company.

Other Benefits Marc May Receive

From time to time, Marc 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.

Capstone FINANCIAL PLANNING

Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.