

Adviser Profile

Sam Mamone

Authorised Representative No.1246294

KDM Financial and Estate Planning Pty Ltd

Your adviser

Contact details

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Sam Mamone

Profile

KDM Financial and Estate Planning, founded by Kris Martin in 2008, was formed to help individuals and business through the complex maze of wealth creation, superannuation, personal insurance and risk management.

Sam Mamone has been individually authorised (Representative Number 001246294) provide financial product advice and deal in all of the below mentioned categories as an employee of KDM Financial and Estate Planning Pty Ltd

Experience

Sam has been in the financial services industry for 6 years. Sam started out working for a boutique financial advice company where he found his passion for working with clients to help them achieve their financial and lifestyle goals. Sam then took on an opportunity to work for one of the big four banks, where he was able to develop his skills and knowledge. He was looking after the advice for their flag ship branch in the Brisbane CBD and worked on remediating clients from previous advisers. Sam has since joined KDM Financial and Estate Planning in December 2019 as a Senior Financial Adviser

Qualifications

2016 – Advanced Diploma of Financial Planning – Monarch

2016 - Diploma of Financial Planning – Monarch

2015 – Bachelor of Business (Finance) - QUT

2012 – Diploma in Commerce - QIBT



Professional memberships

Member of Financial Planning Association of Australia (FPA) – Financial Planner AFP®

Member of Tax Practitioner Board (TPB) – Tax Financial Adviser

Authorisations

Australian Financial Services License

Sam is authorised to provide financial product advice and deal in the following:

- i. Deposit and payment products limited to:
 - a) Basic deposit products
 - b) Deposit products other than basic deposit products;
- ii. Life products including:
 - a) Investment life insurance products as well as any products as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
 - b) Life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- iii. Securities
- iv. Interest in managed investment schemes including investor directed portfolio services;
- v. Retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
- vi. Superannuation.

Fees and Charges

Initial consultation

Free of charge

Advice Preparation

Completion of needs analysis: Free

Advice preparation: \$1,380-\$3,220

The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required. Prior to you agreeing to proceed with the preparation of Statement of Advice, the actual fee will be quoted to you.

Implementation

Implementation Fee \$1,380-\$5,060

This fee may be paid by cheque or collected from the investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review Service

An ongoing adviser service fee will be calculated as a percentage of your total portfolio or a fixed fee (this will be negotiated with the client and will vary depending on the service required). The actual fee will be quoted to you.

Consulting Fees

\$460 per hour

For any other service you required that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services Guide for a detailed explanation of commissions that may be paid by product issuer(s)

Sam is an employee of KDM Financial and Estate Planning Pty Ltd and receives a salary and bonuses.

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.