Financial Adviser Profile

Overview

Aletheia Wealth was founded to better serve clients. With fewer clients per adviser, and the business having no affiliation with product manufacturers, Aletheia Wealth advisers can more clearly focus on meeting your retirement planning needs.

Since 2006, Grant has been helping clients understand their position, clarify their goals, understand their options and advising them on strategies to best prepare for and live their best retirement.

Grant's broad approach to retirement planning, considering the many and sometimes complex intersections of money and life, is focussed on putting his client, rather than products, at the centre of his advice. Ultimately, his aim is to simplify the complex and give his clients peace of mind and the confidence to enjoy a life without financial worry.

Prior to co-founding Aletheia Wealth, Grant was a financial adviser with RetireInvest, Tynan Mackenzie and ipac Securities. Outside of helping his clients, Grant is also excited about surfing (anything ocean related, actually!), cooking, spending time and laughing with family and friends, folk music, playing squash and camping.

Grant Brook is a Sub-Authorised Representative of Aletheia Wealth Pty Ltd, Corporate Authorised Representative No. 1282757. Authorised Representative No. 307561.

Grant Brook

Aletheia Wealth
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0431 166 050
grant@aletheiawealth.com.au

Qualifications

Grant holds an Advanced Diploma Financial Services (Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Grant is a member of Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Grant 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;
- Self Managed Superannuation Funds;
- Securities; and
- Standard Margin Lending Facility.

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Aletheia Wealth Advice Fees and Charges

Grant 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.

You may be charged a fee of $330 (incl. GST) for your initial consultation.

Grant'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.

Grant provides the option of ongoing advisory services. This fee is either a fixed fee p.a. (incl. GST) or a percentage (%) p.a. of the value of your holdings (incl. GST). You will be notified of the cost involved prior to the commencement of any ongoing services.

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

Other Benefits Grant May Receive

From time to time Grant 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.

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