

Structure of entity statement

WiZDOM Wealth Pty Ltd holds an Australian Financial Services Licence No. 4485363. Your financial adviser and WiZDOM Advisory are authorised representatives of WiZDOM Wealth Pty Ltd. This will be detailed in all of the documents that they provide to you including business cards, newsletters and Statements of Advice.

Privacy Statement

WiZDOM Wealth Pty Ltd holds and uses personal information about you as a client. The personal information that you provide is necessary to enable your financial adviser to make recommendations appropriate for your needs and circumstances. If you decide not to provide the necessary information then your financial adviser may not be able to provide you with financial advice. You should also understand that if you provide incomplete or inaccurate information, you may not receive the right advice and you may lose your right to seek compensation as a consequence.

As part of the implementation and review of your financial plan your personal information may, as required, be transferred or handled by fund managers, insurers, government regulatory bodies, legal and other professional advisers and other business support providers. By completing this fact find (or providing details to your financial adviser to complete your fact find), you consent to WiZDOM Wealth Pty Ltd collecting, using and disclosing your personal information for these purposes.

You can access your own personal information by contacting WiZDOM Wealth's Privacy Officer. A fee may apply. If your personal information is inaccurate or not up to date you may request for us to update it. A copy of WiZDOM Wealth Privacy Policy can be obtained from the WiZDOM Advisory website.



Knowledge | Experience | Integrity

WiZDOM Wealth Pty Ltd
ABN 30 610 459 651
Australian Financial Services Licensee 485363.