

## Adviser profile

# Anoma Peiris AFP®

Authorised Representative No. 1002082

## KDM Financial and Estate Planning Pty Ltd

Corporate Authorised Representative No. 425536

### Your adviser

#### Contact details

Office address Fortune House, Suite 7, 36 Finchley Street, Milton Qld 4064  
Postal address PO Box 1066, Milton Qld 4064  
Phone 07 3369 0010  
Fax 07 3369 0018  
Mobile 0436 444 818  
Email [anoma@kdmfinancial.com.au](mailto:anoma@kdmfinancial.com.au)  
Website [www.kdmfinancial.com.au](http://www.kdmfinancial.com.au)



**Anoma Peiris**

#### Profile

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

Anoma Peiris has been individually authorised (Representative Number 1002082) to provide financial product advice and deal in all of the below mentioned categories as an employee of KDM Financial and Estate Planning Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.

#### Experience

Anoma has in excess of 15 years financial services industry experience. Her career began as a Research Analyst at Morningstar Research, a major managed funds and listed security research house. In 2002, Anoma joined Grant Thornton and held variety of financial planning positions prior to becoming a Financial Adviser in 2012. Anoma joined KDM Financial Planning and Estate Planning in March 2018.

#### Qualifications and certifications

2017 - Master of Financial Planning - Kaplan

2007 - Graduate Certificate in Financial Planning – Securities Institute of Australia (FINSIA)

2006 - Graduate Diploma of Applied Finance & Investments – Securities Institute of Australia (FINSIA)

1998 - Bachelor of Commerce (Accounting) – Griffith University

#### Professional memberships

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

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

## Authorisations

### **Australian Financial Services License**

Anoma Peiris 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 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: \$550 - \$2,200

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 a Statement of Advice, the actual fee will be quoted to you.

### **Implementation**

Implementation fee: \$770 - \$4,950

This fee may be paid by cheque or deducted from any 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**

A minimum ongoing adviser service fee will be calculated as a percentage of your total portfolio to a maximum of 1.5%.

### **Consulting fees**

\$385 per hour

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

### **Commissions**

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

Anoma 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.