

Adviser profile

Morgan Rohan Johnson

Authorised Representative No. 460730

KDM Financial and Estate Planning Pty Ltd

Corporate Authorised Representative No. 425536

Your adviser

Contact details

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Profile

Our mission is to use our knowledge and experience when helping businesses and individuals with their risk management, business succession and estate planning needs by building a friendly relationship in a holistic and honest manner.

Morgan Johnson has been individually authorised (Representative Number 460730) 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

Morgan has actively worked in the financial services industry since 2010 and through his past experiences at a major Australian insurance, bank and stockbroking institution, he has developed knowledge and experience in the areas of financial planning, superannuation and personal risk insurance.

Qualifications and certifications

Morgan has completed a Diploma of Financial Planning, Bachelor of International Business, and a Bachelor of Arts (Asian & International Studies). With these qualifications and experience, he is well qualified to help clients to achieve their financial goals.

Professional memberships

Morgan is a member of Association of Financial Advisers (AFA)

Morgan Johnson

Authorisations

Australian Financial Services License

Morgan Johnson 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);
- vi. superannuation

Fees and charges

Initial consultation

Free of charge

Advice preparation

Completion of needs analysis: Free

Advice preparation: \$550 - \$4,550

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 \$750 - \$4,550

Up to 2% for up to \$100,000

Up to 1.5% from \$100,001 to \$250,000

Up to 1% for any amount over \$250,001

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 or a fixed fee (this will be negotiated with you, the client, and will vary depending on the service required). The actual fee will be quoted to you.

Consulting fees

Up to \$330 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).

Morgan Johnson is an employee of KDM Financial and receives 77% of all revenue he generates via a salary.

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.