

About Your Adviser

Ivan Bakin

Authorised Representative No. 267452

IBAA

Ivan Bakin & Associates Pty Ltd

Authorised Representative No. 285888

Business Contact Details

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About Me

As your financial adviser, I am passionate about providing quality advice and solutions personalised to your needs.

I commenced my career as a financial adviser in 1992 and became an authorised representative of Alliance Wealth Pty Ltd on 12 October 2019.

I hold the following qualifications:

- Diploma of Financial Services (Financial Planning)

I hold the following memberships:

- Associate of the Financial Planning Association of Australia

I am authorised to provide the following financial services:

Superannuation and Retirement Planning

Personal Superannuation
Corporate Superannuation
Industry and Public Sector Superannuation
Pensions and Annuities
Centrelink / Veterans' Affairs Assistance

Wealth Creation and Investments

Cash and Term Deposits
Investment Bonds
Managed Investments

Wealth Protection

Term Life Insurance
Total and Permanent Disability (TPD) Insurance
Trauma Insurance
Income Protection Insurance
Business Insurance
Insurance Claims Assistance

Other Financial Planning Services

Budgeting and Cashflow Management
Debt Management

My Remuneration

I am remunerated by:

- Salary

The following table summarises the types of fees or commissions that are applicable to the services that I provide. Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply. All amounts are inclusive of Goods and Services Tax (GST).

Type of Remuneration	From	To
SoA Preparation Fee	\$0	\$5,000
Hourly Rate		\$200

Type of Remuneration	Initial	Per Annum
Adviser Service Fee	\$0 to \$5,000	
Insurance Commission*	0% to 66%^	0% to 33%

* Based on a % of funds invested or insurance premiums

^ Applicable from 1 January 2020 to new policies. If the policy was issued before 1 January 2020, commission of up to 130% will apply to additional cover.

Benefits, Interests and Associations

The Business, associated entities or I do not have related parties, shareholdings or arrangements with referral parties that may be capable or reasonably seen to be capable of influencing my advice.