

# Emma Samers Representative Profile

Version 1.2, Issued 1 July 2019



Insurance | Risk Management | Consulting

This profile is part of the Financial Services Guide (FSG) and is only complete when the FSG (part 1) is attached.

## Emma Samers

Emma Samers is a representative of Gallagher Benefit Services Pty Ltd (GBS).

Phone: **1300 557 782**

Email: **emma\_samers@ajg.com.au**

## Education and qualifications

**DFP1 Introduction to Financial Planning**

**DFP2 Risk Management and Insurance planning**

**Certificate IV in Superannuation (ASFA 100)**

## Experience

Emma has over 10 years' experience in the financial services industry and she has held a range of positions including Client Services Manager, Key Account Manager and Executive Assistant.

## Roles and responsibilities

Emma is a Key Account Manager and ensures the best possible solutions and high quality service are provided to clients on a daily basis.

Emma looks to maintain close working relationships with clients to ensure we are the first port of call when they require assistance.

Key responsibilities include:

- Assessing and understanding company superannuation requirements
- Assisting employers maximise their employee benefits
- Tender management of employer default superannuation arrangements
- Negotiating terms to obtain optimum group insurances for employers
- Ongoing management of employer group benefits and claims
- Delivering member education programs and general financial advice to employees

## Advice Emma can provide

Emma is authorised to provide general advice and deal in the following financial products:

- Superannuation
- Life risk insurance products

## Fees

We are committed to providing you with comprehensive service and advice to ensure that you meet your stated objectives.

Additional services are obtainable from Gallagher Benefit Services Pty Ltd charged to you at the following hourly rates:

- \$330 per hour for a financial adviser.
- \$220 per hour for an associate financial adviser and / or paraplanner.
- \$110 per hour for administrative support.

Please refer to the Financial Services Guide (part 1) for a detailed explanation of other fees that may be payable for the financial advice provided to you.

## How Emma is paid

Emma is a salaried employee of Super Advice Corporate Services Pty Ltd, which is owned by Gallagher Benefit Services Pty Ltd. Gallagher Benefit Services Pty Ltd will retain 100% of the gross revenue received for the recommended financial services and/or products. Emma may be eligible to receive a performance bonus from Super Advice Corporate Services Pty Ltd.

## Appendix: Privacy Collection Statement

As part of the financial planning process, we need to collect information about you. Where possible we will obtain that information directly from you, but if authorised by you we may also obtain it from other sources such as your employer or accountant. If that information is incomplete or inaccurate, this could affect our ability to fully or properly analyse your needs, objectives and financial situation, so our recommendations may not be completely appropriate or suitable for you.

We are also required under the Anti-Money-Laundering and Counter-Terrorism Financing Act (AML/CTF) 2006 to implement client identification processes. We will need you to present identification documents such as passports and driver's licences in order to meet our obligations.

We keep your personal information confidential, and only use it in accordance with our Privacy Policy. Some of the ways we may use this information are set out below:

- The representative and our staff may have access to this information when providing financial advice or services to you;
- The representative and our staff may, in the future, disclose information to other financial advisers and brokers to review customers' needs and circumstances from time to time, including other companies within the Gallagher Group;
- Your information may be disclosed to external service suppliers both here and overseas who supply administrative, financial or other services to assist your adviser and the Gallagher Group in providing financial advice and services to you.
- Your information may be used to provide ongoing information about opportunities that may be useful or relevant to your financial needs through direct marketing (subject to your ability to opt-out as set out in the Gallagher Benefit Services Privacy Policy);
- Your information may be disclosed as required or authorised by law and to anyone authorised by you.

Your adviser will continue to take reasonable steps to protect your information from misuse, loss, and unauthorised access, modification or improper disclosure. You can request access to the information the Licensee holds about you at any time to correct or update it as set out in the GBS Privacy Policy. The GBS Privacy Policy also contains information about how to make a complaint about a breach of the Australian Privacy Principles. [Click here](#) for a copy of GBS's Privacy Policy or you can contact us.

## Our contact details

### Emma Samers

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**Postal Address:** PO Box 7415, Cloisters Square PO, WA 6850  
**Phone:** 1300 557 782  
**Email:** super-service@ajg.com.au

### Gallagher Benefit Services Pty Ltd

**ABN:** 49 611 343 803  
**AFSL:** 488001  
**Address:** Suites 14-18, Level 3, 17 Bowen Bridge Road  
Herston QLD 4006  
**Phone:** 1300 850 757  
**Email:** GBSAU\_Admin@ajg.com.au  
**Website:** gallagherbenefits.com.au

## Changes to this Representative Profile

Information in this document may change from time to time. We may make such changes by amending the Representative Profile and publishing an updated version on our [website](#). You may also obtain a printed copy of the updated information by calling 1300 850 757.