FINANCIAL ADVISER PROFILE (FSG Part 2)

Sam Tabit

Principal Financial Planner of Bamboo Wealth

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Overview

Sam Tabit and Bamboo Wealth Management Pty Ltd trading as Bamboo Wealth Financial Planning and Mortgage Solutions are Authorised Representatives No 1252323 and 343039 (respectively) acting under authority from Hejaz Financial Advisers.

Sam Tabit has been in the financial services industry since 1998, bringing over 25 years of experience to his clients. He has served as a Senior Financial Planning Lecturer at RMIT University for 15 years and at La Trobe University since 2010. As a Senior Financial Planner®, Sam is dedicated to helping his clients achieve their financial goals. His expertise also extends to financial management, financial analysis, and implementing process improvements that drive business growth.

Sam Tabit brings an extensive level of knowledge including experience developing strategic partnerships with business partners and institutions to create an increased value proposition to our clients' enhancing client overall productivity and satisfaction.

Education

List all relevant qualifications:

- **Masters of Financial Planning, RMIT University**
- **Certified Financial Planner®**
  Certified Financial Planner™
- **Graduate Diploma in Applied Finance & Investments SMSF Specialist**
- **Self-Managed Superannuation Fund Accreditation ASX Listed Products**
- **Diploma Vocational Education & Training**

Authorisations

Sam Tabit is a Principal of Bamboo Wealth Management Pty Ltd who are both authorised by Hejaz Financial Advisers to offer the following services to retail and wholesale clients:

- Provide financial product advice; and
- Deal in a financial product by arranging for a financial product to be acquired, disposed of, or varied.

In respect of the following financial products:

- Deposit and payment products (basic and non-basic)
- Debentures, Stocks or Bonds issued by a Government
- Life Products, including:
  - i. Investment Life Insurance Products
  - ii. Life Risk Insurance Products
- Interests in Managed Investment Schemes (incl IDPS)
- Retirement Savings Account Products
- Superannuation
- Securities
- Standard Margin Lending Facility

Advice Fees and Charges

Sam Tabit will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you.

The cost of providing a financial product or service to you will depend on the nature and complexity of the advice, financial product and/or service provided. Generally, whenever your Adviser provides a recommendation for a financial product or service, your Adviser may be remunerated through either:

- An initial fee for service; and/or
- An ongoing fee for service; or
- A contribution fee or implementation fee; or
- Commission payments from product providers where applicable; or
- A combination of any of the above.

Fees may be fixed dollar amounts, hourly rates, or asset-based percentages (where allowed) and are invoiced directly or, where permitted, deducted from your product(s). For ongoing fee arrangements, your Adviser will provide an annual Fee Disclosure Statement and seek written consent to renew and (where applicable) deduct fees; if consent is not provided within the required period, the arrangement will cease.

Details of the ranges and amounts of remuneration are set out below. Amounts are exclusive of GST

Type of Remuneration	Initial	Ongoing
Adviser Service Fees	$1,500 - $10,000	$1,500 - $10,000
SoA Preparation Fee	$1,500 - $10,000	-
Hourly Rate	$500	-
Investment Commission*	-	-
Insurance Commission^	60%	20%

**based on a % of funds invested*
^based on a % of the premium

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply.

Sam Tabit pays licensing fees to Hejaz Financial Advisers Pty Ltd and will receive revenue earned from the financial services provided to you. A two-year claw-back of commissions may apply.

Other Benefits Sam Tabit May Receive

From time to time Sam Tabit may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than $300. A register listing the details of any non-cash benefits between $100 and $300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information, you can request a copy of the register.