Financial Adviser Profile

Overview

Gerrie Vermeulen is a knowledgeable, detail-oriented, and relationship-focused financial adviser with almost two decades of experience in the fast-paced financial industry. He has established himself as a trusted adviser and insurance specialist for professionals, earning the trust and admiration of his clients and peers alike.

Throughout his career, Gerrie has held various challenging roles across the industry, including business banker, private banker, paraplanner, and senior financial adviser. He has managed over $75 million for clients and arranged over 250 insurance policies for professionals, producing exceptional results through his tireless work and dedication.

Gerrie's commitment to expanding his experience and financial acumen has led him down the path of leadership and relationships with high-net-worth clients. He has worked with the best organisations in the industry and has become an excellent holistic financial adviser, helping clients discover what they value most and building financial plans to achieve their goals.

Gerrie Vermeulen is a Sub-Authorised Representative of Everalls Wealth Management Pty Ltd (Corporate Authorised Representative No. 465367. Authorised Representative No. 1236313).

Qualifications

Gerrie holds the following qualifications and meets the competency requirements under ASIC's Regulatory Guide RG 146:

- B.Com Marketing Management
- B.Com (Honours) Communication Management
- Diploma in Financial Planning
- Advanced Diploma in Financial Planning
- Post Graduate Diploma in Financial Planning
- Certificate IV in Finance & Mortgage Brokering
- Certified Financial Planner – Financial Planning Association of Australia

Professional Memberships

Gerrie is a Certified Financial Planner CFP® and a member of the Financial Planning Association of Australia and the Tax Practitioners Board and abides by their codes of professional conduct and ethics.

Johannes (Gerrie) Vermeulen

Everalls Wealth Management

Level 5, 224 Bunda Street
Canberra City ACT 2601

GPO Box 920
Canberra ACT 2601

Phone: 02 6232 4561
Fax: 02 6232 4548

info@everallswealth.com.au
www.everallswealth.com.au

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everalls wealth management
Building Better Futures

Authorisations

Gerrie Vermeulen is authorised to provide advice and deal in the following financial products:

- Superannuation;
- Self Managed Superannuation Funds;
- Securities;
- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products; and
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government.

Everalls Wealth Management Advice Fees and Charges

Gerrie may 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 before work is commenced.

The fees that Everalls Wealth Management charges for the preparation of initial advice and any ongoing advisory services will be charged on a fee for services basis (not commission based), with an hourly rate of $350 +GST. You will be notified of the time involved prior to the commencement of any work if applicable.

Where financial planning advice fees are payable, Capstone Financial Planning will receive all revenue in the first instance.

Everalls Wealth Management Pty Ltd pays a fixed licencing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you.

Gerrie is appointed as an Authorised Representative under Everalls Wealth Management Pty Ltd. Capstone Financial Planning has no association with DFK Everalls Pty Ltd.

Other Benefits Adviser May Receive

From time to time Gerrie 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.