

Overview

Gerrie Vermeulen is a trusted financial specialist with a focus on holistic and tax aware planning. His expertise lies in helping families to optimise their tax strategies and structures to achieve their goals. He prides himself on building lasting relationships with his clients, understanding their needs, providing tailored solutions and helping them to simplify their lives. He enjoys the outdoors with his family and spending time on the sport fields cheering on his two young boys.

Gerrie has been invited and joined the Financial Advice Association Australia local committee, where he has earned the trust and respect of his peers. His experience includes working at the Commonwealth Superannuation Corporation (CSC), where he became a specialist in the Commonwealth Superannuation Scheme (CSS), Public Sector Superannuation Scheme (PSS), Military Superannuation & Benefits Scheme (MSBs) and Defence Force Retirement & Death Benefit Scheme (DFRDB) defined benefit superannuation funds. He also helped build a Wealth and Insurance Division for a large organisation, providing financial advice to medical professionals, predominantly regarding their personal insurance needs. Gerrie enjoys spending time really getting to know his clients to create holistic solutions that they become just as passionate about as he does.

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 ASICs 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 Advice Association Australia.

Professional Memberships

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



**Johannes (Gerrie)
Vermeulen**

Everalls Wealth Management

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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
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Margin Lending.

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.

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 a salaried employee of Everalls Wealth Management Pty Ltd and will receive a salary/benefit from this company.

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.