ABOUT YOUR ADVISER

Patrick Tuazon | Authorised Representative Number 1004689

Adviser Profile | 3rd February 2025

WSN Wealth Unit Trust t/a WSN Wealth Pty Ltd | ABN 82 393 576 498

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About Me

I have worked in the financial services industry since 2007 in various roles covering Superannuation, Investments, Margin Lending, Insurance, Banking and Advice. After working with large institutions such as BT Financial Group and Westpac, I founded WSN Wealth as a way to give more holistic and personalised advice to my clients.

I hold the following qualifications:

- Master of Financial Planning
- Advanced Diploma of Financial Planning

I hold the following memberships:

- Financial Planning Association

Authorisations

I am authorised in the following financial services and products:

- Superannuation
- Pensions and Annuities
- Self-Managed Superannuation Funds
- Cash and Term Deposits
- Managed Investments
- Listed Securities (shares and other products)
- Investment Bonds
- Managed Investment Schemes including IDPS
- Retirement Savings Accounts
- Margin Lending
- Life Insurance
- Centrelink/Veterans Affairs Assistance
- Budgeting and Cashflow Management
- Debt Management

Remuneration

I am remunerated by:

- Salary and Profit Share

The following table summarises the types of fees or commissions that applicable to the services that I provide. All amounts are inclusive of Goods and Services Tax (GST).

Remuneration	Up to	
SoA Preparation Fee	$6,600	
Implementation Fee	$6,600	
Hourly Rate	$440	
Remuneration	**Initial**	**Per Annum**
Adviser Service Fee	$0	Up to $16,500
Adviser Service Fee (asset based)*	0%	Up to 1.1%
Insurance Commission*	0% to 66%^	0% to 35%

*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.

For example, a 1% Adviser Service Fee based on a $200,000 investment would equal a $2,000 fee payable.

Benefits, interests and associations

The financial planning business and I have arrangements with the following parties that may be capable or reasonably seen to be capable of influencing my advice. Arrangements may include payments or benefits and/or where another party may benefit financially should you utilise certain services or products.

Where applicable the specifics of any benefits or payments made or received will be disclosed to you in writing and agreed at the time of providing advice.

- I am a Shareholder of Powe Partners Pty Ltd which provides Accounting services (a separate entity to The Trustee for WSN Wealth Unit Trust t/a WSN Wealth Pty Ltd) and may therefore benefit from you using their services. We will only recommend you use these services where we believe it is in your best interest to do so, and with your agreement.

- I am a Shareholder of CGC Law Pty Ltd which provides services (a separate entity to The Trustee for WSN Wealth Unit Trust t/a WSN Wealth Pty Ltd) and may therefore benefit from you using their services. We will only recommend you use these services where we believe it is in your best interest to do so, and with your agreement.