



Sequoia Asset Management Advisor Profile - James Holyman

AFSL 341506

Dated 21 May 2019

This advisor profile is to be read in conjunction with Sequoia Asset Management Pty Limited ABN 70 135 907 550 Financial Service Guide (FSG).

The Adviser profile sets out the details of the Representative, the services and products they may provide and details of the remuneration they may receive.

Representative

James Holyman is an employee of Sequoia Asset Management and has been appointed by Sequoia Asset Management as a Representative (1262741).

Areas of Authorisations

James is authorised by Sequoia Asset Management to provide General Advice and No Advice Services and deal in the following financial products:

- Derivatives
- Life Risk Insurance
- Managed Investment Schemes including investor directed portfolio services
- Securities
- Superannuation

The **General Advice** James provides is provided to you without regard to your individual objectives, financial situation or needs. It is not specific advice for your personal circumstances and it is not intended to be relied upon by you as being appropriate for you. Before making any decision about investing in the financial product, you should consider the appropriateness of the general advice presented, having regard to your personal objectives, financial situation and needs. Further, you should read the Product Disclosure Statement or Information Memorandum relative to this advice before you determine to make an investment (if a PDS or IM is required).

The **No Advice** service that James provides is to confirm a factual matter (such as the price of a security) or to assist in the acquisition of a financial product (such as the purchase of a number of shares on your personal trading account). James will not provide any recommendation in respect of a financial product or its appropriateness for you. You will be making your own investment decisions, including the choice of investment, the dollar amount etc.



James is not authorised to provide you financial services advice in any manner in which he recommends, states or infers that a financial product is appropriate for you, or that he has taken into account your personal objectives, financial situation and needs in relation to that financial product.

Professional Qualifications

James has completed:

Bachelor of Agricultural Economics - University of Sydney
Diploma of Financial Planning - Integrity Education Group
Accredited Derivatives Adviser Level 1 – Kaplan Professional
Advanced Diploma of Financial Planning - Integrity Education Group

Remuneration

Sequoia Asset Management retains 100% of all incomes it receives from James' activities. This includes upfront fees, brokerage, management fees and initial &/or ongoing commissions paid by you. James may receive up to 50% of total revenue he generates for Sequoia inclusive of salary.

Other Benefits

James may receive other benefits including attendance at professional development programs, conferences and other incentives such as allowances and other related entertainment benefits.

Contact Details

Licensee - Sequoia Asset Management

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