

## Financial Services Guide

Adviser Profile Version 13.0

Dated 13 July 2023

The Financial Services Guide (FSG) is an important document. You should read it carefully and make sure you understand it. To assist you in choosing a Representative, our Representatives are required to provide an FSG and an Investment Manager profile.

### 1. Who will provide your services?

The financial services referred to in this FSG are offered by:

**Alexander Giles Edmonds (Alex Edmonds) ('Investment Manager')**

ASIC Authorised Representative Number 1256685

**Address**

Level 7, 7 Macquarie Place Sydney NSW 2000

**Telephone**

02 8114 2222

1300 130 545 (Free call)

**Email**

alexedmonds@sequoia.com.au

### 2. About Your Investment Manager

Alex has worked in the Financial Services industry since 2017 and joined Sequoia in early 2020. Alex has extensive background in Self-Managed Superannuation funds, in particular acquiring property through Super which he specialised in in his previous role. Alex has experience in assisting self-directed investors to allocate capital including Australian & International Equities, listed and unlisted funds and bonds.

Alex puts an emphasis on education and is regularly publishing blogs and articles in order to assist his clients and the broader public about the intricacies of personal finance and investing.

He holds the following qualifications:

Bachelor of Business – University of Technology, Sydney

Diploma of Financial Planning – Integrity Education Group

Accredited Derivatives Adviser Level 1 – Kaplan

The Financial Services which can be provided by your adviser

- financial product advice (general advice only)
- dealing in a range of financial products including:
  - basic deposit products
  - derivatives
  - government debentures, stocks or bonds
  - life risk insurance
  - managed investment schemes including Investor Directed Portfolio Services
  - securities
  - superannuation and retirement savings accounts

to retail and wholesale clients

### 3. Remuneration

Alex is a salaried employee of Sequoia Asset Management Pty Ltd. All fees, commission and other remuneration or benefits are received by Sequoia Asset Management Pty Ltd.

Other Benefits – Alex may receive other benefits including share of profits, attendance at professional development programs, conferences, and other incentives such as allowances and other related entertainment benefits.