



## Representative Profile

VERSION 7.0

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This document forms the second part of the Oreana Financial Services Guide. This FSG is divided into two parts and both parts must be read together. This document is designed to clarify who we are, what we do, and aims to help you decide whether to use our services.

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## WHO ARE WE

Your financial advisor(s) are Representatives of and offer services on behalf of Oreana Financial Services Pty Ltd, AFSL License No. 482234:

**Jonathan Black**  
**Authorised**  
**Representative**  
**No. 001002038**

**David Conte**  
**Authorised**  
**Representative**  
**No. 001243350**

**Laura Peressini**  
**Authorised**  
**Representative**  
**No. 001002081**

**Anqi Angie Li**  
**Authorised**  
**Representative**  
**No. 001310993**

**Gordon Thoms**  
**Authorised**  
**Representative**  
**No. 000293637**

**Jarred Boniek**  
**Authorised**  
**Representative**  
**No. 001316718**

The Financial Services that the above financial advisor(s) offer is provided by Oreana Private Pty Ltd, ABN 30 647 833 958, trading as Oreana Private Wealth, Authorised Representative (AR) No. 001288628.

Oreana Private specialise in providing advice to Executives, Professionals, Expatriates, Business Owners and Retirees. Our range of services and advice are designed to enhance your financial wellbeing and assist with managing your financial complexity, allowing you to focus on your business, family and/or retirement needs.

Oreana has authorised your advisor to provide you with this Financial Services Guide.

### About Jonathan Black Founding Partner

Jon has been working in both private client and funds management advisory since 1994 bringing a wealth of practical experience and strategic insight to his clients through a highly personalised approach.

He holds a Bachelor of Commerce degree from the University of Melbourne, is a Certified Financial Planner (CFP®), an Accredited Investment Fiduciary (AIF®) and a FINSIA Fellow.

Outside of Oreana, Jon cherishes quality time with family and friends. He actively participates in his regional community foundation, embracing the philosophy of giving back.

### About Laura Peressini Founding Partner

Laura believes that wealth opens doors, provides security, and allows us to support our loved ones. She is passionate about turning her clients' dreams into reality.

She holds a Bachelor of Finance degree from La Trobe University, an Advanced Diploma in Financial Planning, and is a Certified Financial Planner (CFP®).

Outside of Oreana, Laura is a dedicated mother who enjoys travelling with her young family, sharing cultural experiences, and creating cherished memories.



## About Gordon Thoms Partner

With over 30 years of experience in financial services, Gordon leverages his extensive knowledge to help each of his clients grow, protect and enjoy their wealth.

He holds a Bachelor of Economics degree, is a Certified Financial Planner (CFP®), a FINSIA Fellow, and a member of the Financial Advice Association Australia.

Outside of Oreana, Gordon is a devoted family man and philanthropist. He serves as a director of several private charitable foundations that support community, health, and environmental causes.

## About Angie Li Senior Associate Adviser

Angie is dedicated to helping people feel secure about their finances, leveraging her broad experience in financial advice to ensure clients reach their goals with confidence. She's completing her Professional Year under Laura Peressini's supervision.

Angie holds a Bachelor of Commerce (Finance & Accounting) from the University of Melbourne and a Graduate Diploma of Financial Planning from Kaplan Professional and contributes to the Next Gen committee of the Financial Advice Association Australia.

Outside of work, she enjoys exploring cuisines, cooking, baking, crafting, discovering cultures, and connecting with diverse people using her bilingual skills.

## About David Conte Partner

David's unwavering commitment to his clients is driven by witnessing the profound impact his strategies have on both their wealth and personal lives.

He holds a Bachelor of Business (Banking & Finance), an Advanced Diploma of Financial Planning, and is a Certified Financial Planner (CFP®) and a member of the Financial Advice Association Australia.

Outside of Oreana, David enjoys spending time with his family, watching sports, and travelling. He is a passionate soccer fan, sometimes staying up all night to watch live matches from Europe.

## About Jarred Boniek Provisional Adviser

Jarred believes that the best financial advice begins with a deep understanding of each client's values and aspirations. He works collaboratively with professionals and business owners to craft strategies that simplify complexity, build enduring wealth, and safeguard what matters most, now and for generations to come.

He holds a Bachelor of Business (Accounting) and a Master of Financial Planning and brings seven years of industry experience supported by a strong technical foundation and a commitment to excellence.

Outside of Oreana, Jarred enjoys playing guitar and exploring new cuisines, always on the lookout for memorable dining experiences.



## WHAT WE DO

**We are authorised by Oreana Financial Services to provide financial advice in relation to:**

- Wealth Accumulation
- Asset Allocation
- Investments & Portfolio Construction
- Income & Asset Protection
- Tax Strategies
- Superannuation (Inc. SMSFs)
- Retirement & Redundancy Planning
- Estate Planning
- Government Benefits
- Debt Management
- Margin Lending
- Expatriate Financial Planning

## WHAT FINANCIAL PRODUCTS AND SERVICES ARE WE AUTHORISED TO PROVIDE?

**We are authorised to provide personal financial advice, general financial advice, and transact on your behalf (dealing) in relation to the following types of financial products:**

- Basic / Non-Basic Deposit Products and Non-Cash payment facilities.
- Debentures, stocks or bonds issued or proposed to be issued by a government.
- Life products – Investment Life Insurance.
- Life products – Life Risk Insurance.
- Managed investment schemes, including Investor Directed Portfolio Services (IDPS).
- Retirement savings accounts (“RSA”) products.
- Securities.
- Superannuation; and
- Standard Margin Lending.



## HOW WE CHARGE FOR OUR SERVICES

All fees and commissions are inclusive of GST and the fees could be greater than those disclosed below in complex cases. In these instances, we will inform you of the exact fee payable promptly in writing.

| Type of Advice  | Fee Charged  |
|---|--|
| Initial consultation                                      | At our expense.  |
| Initial advice<br>(advice preparation and implementation) | <p>Fees may range from \$0 to \$660 per hour and will vary depending on the level of complexity of your situation. A minimum dollar equivalent fee of \$3,300.00 applies and may vary depending on the level of complexity of your situation.</p> <p>The initial advice fee comprises two components:</p> <p>An advice preparation fee – charged for the preparation for a written Statement of Advice.</p> <p>An implementation fee – charged for implementing the advice and recommendations.</p>  |
| Ongoing advice  | <p>Oreana Private offers our clients an ongoing advisory service. The ongoing advice fee is generally a fixed dollar fee based on the level of service required, the frequency of the review and the complexity of the advice.</p> <p>Where an asset-based fee is charged for ongoing advice, the fee ranges from 0.00% to 1.65% per annum based on the amount under advice. A minimum dollar equivalent fee of \$6,600 applies.</p> <p>For example, for a portfolio valued at \$500,000 the maximum ongoing fee would be \$8,250 p.a.</p> |
| Ad hoc advice   | The fees for the provision of ad hoc advice not covered by an Ongoing Service arrangement will be charged on an hourly basis at a rate of up to \$660.   |
| Insurance products  | We will receive commission for our initial and ongoing services to you. Initial commission is between 0% and 66% and the ongoing commission is between 0% and 33% of the annual premium and is paid by the insurance product issuer to us.   |

## HOW WE ARE PAID

### Director

As directors of Oreana Private we are entitled to receive director fees or distributions from Oreana Private. The directors of Oreana Private include Jonathan Black, Laura Peressini, Gordon Thoms & David Conte. We do not receive any bonuses, benefits or additional payments for recommending specific products or providers and the remuneration scheme of which I am part has been designed to ensure that your interests are prioritised, conflicts are minimised and that my advice is not inappropriately influenced.

### Authorised Representative (Employee)

We receive a salary as employees of Oreana Private. We do not receive any bonuses, benefits or additional payments for recommending specific products or providers and the remuneration scheme of which I am part has been designed to ensure that your interests are prioritised, conflicts are minimised and that our advice is not inappropriately influenced.



## REFERRAL RELATIONSHIPS

The table below outlines the referral relationship(s) we have. If we do refer you, we may receive a fee payment or commission for the services stated below. We will not refer you for this service unless it is in your best interest and necessary for you to achieve your goals and objectives.

| Name of referral partner      | Services                                     | Payment received for referral   |
|-------------------------------|--|---|
| Professional Insurance Advice | Personal Insurance Advice and Implementation | 30% of initial and renewal brokerage earned by Professional Insurance Advice  |
| MCP Financial Services        | Mortgage and Debt Solutions                  | 20% of the initial brokerage paid to MCP from the Financier and 20% of the trailing brokerage paid to MCP from the financier.                           |
| Finance Workshop              | Mortgage and Debt Solutions                  | 20% of the initial brokerage paid to Finance Workshop from the Financier and 20% of the trailing brokerage paid to Finance Workshop from the financier. |

### **Our Associations and Relationships**

*Oreana Financial Services Pty Ltd is the holder of an Australian Financial Services License. We act as an Authorised Representative of Oreana Financial Services Pty Ltd. The Oreana Group comprises of divisions, which also includes Ascalon Capital. We may recommend a portfolio to you that has been researched by Ascalon Capital. We do not receive any incentives or benefits by utilising the asset consulting services of Ascalon Capital.*

All fees and commissions disclosed in this FSG are paid to Oreana, who pays all fees and commissions it receives to Oreana Private Pty Ltd.

**For more information or if you have any questions, please contact us at:**

Oreana Private Pty Ltd  
 ☎ 03 9824 2777  
 ✉ [information@oreanaprivate.com.au](mailto:information@oreanaprivate.com.au)  
[www.oreanaprivate.com.au](http://www.oreanaprivate.com.au)