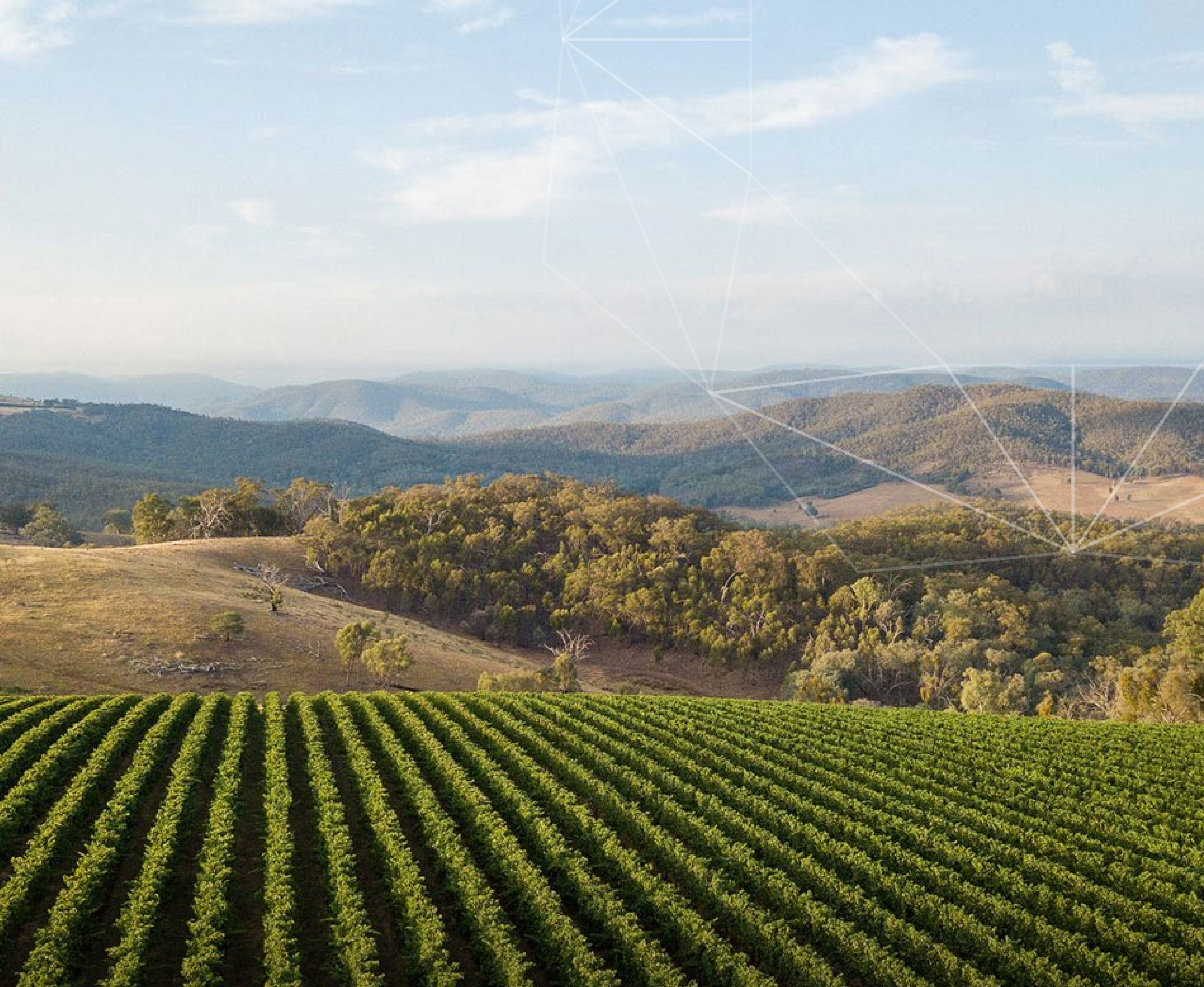

HAMILTON WEALTH PARTNERS

Financial Services Guide

17 June 2024

V4.0

Address

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www.hamiltonwealth.com.au

The Financial Services Guide (FSG) is an important document. It is issued by Hamilton Wealth Partners Pty Ltd (Hamilton Wealth Partners) ABN 84 155 674 043, holder of Australian Financial Services License (AFSL) 440046 and is designed to help you decide whether to use the financial services offered by Hamilton Wealth Partners.

Under Hamilton Wealth Partners AFSL we are only authorised to provide general advice to a "retail person" as defined under the Corporations Act. In providing general advice we do not consider your financial objectives, financial situation and needs. You should consult an accredited financial adviser authorised to consider those matters to enable suitable personal financial advice to be given.

The purpose of this Financial Services Gide (FSG)

The purpose of this FSG is to provide retail persons to whom we are authorised to provide general advice, information about:

- who we are;
- to assist you in making a decision to use the services offered in this FSG;
- remuneration we may receive in relation to the services we provide;
- your privacy;
- how we deal with complaints;
- how you can contact us.

General advice provided may refer to securities or managed investments. You should make your own enquiries in relation to securities mentioned. In the case of managed investments, you should obtain a Product Disclosure Statement (PDS) and Target Marked Document (TMD) and consider the PDS and TMD before making any decision about whether to acquire the financial product.

Who is Hamilton Wealth Partners?

Hamilton Wealth Partners (HWP) is a specialist, wealth management firm founded in 2013 to service families, individuals and for purpose institutions.

We leverage our relationships with global partners to deliver expert investment and strategic advisory services.

Our Directors draw on in some cases over 35 years' of experience in Australia and internationally.

We are guided by our Advisory Board and Investment Policy Board, both of which are independently chaired, providing an additional depth of expertise and an objective voice.

HWP is owned by its Directors and is not beholden to any financial institution or external interest. We do not accept third party payments and operate under a transparent fee for service relationship, ensuring an alignment of interest between HWP and its clients.

Services Offered by Hamilton Wealth Partners

Hamilton Wealth Partners is authorised under its Australian Financial Services Licence to provide general financial product advice in relation to:

- Basic deposit products
- Superannuation inc. SMSF
- Retirement savings accounts
- Life products
- Interests in managed investment schemes, including IDPS
- Fixed Interest
- Securities
- Standard Margin Lending

Remuneration and other Benefits

Whether or not you will be charged by us for receiving general advice as a retail person will be discussed with you at the time of giving that advice. If a charge is to be applied this will be at our standard hourly rate which is $450 an hour plus GST.

We do not receive any fees from product issuers for providing general advice.

Our staff are remunerated through salary and bonuses and if a shareholder in Hamilton Wealth Partners, may receive dividends.

Who do we act for?

When we provide general financial advice, we are not acting for you. As we have noted above, general advice is made without taking into account the objectives, financial situation or needs you have. Accordingly, you need to consider the appropriateness of the advice, in light of your own objectives, financial situation or needs before acting on the general advice provided. We suggest that you seek the advice of an accredited financial adviser to assist you.

Privacy

We are committed to maintaining the privacy of information that you may provide to us. How we do this is detailed in the Privacy Policy that you can request by telephoning our office on 03 9275 8888 or obtaining from our website.

Should you visit the Hamilton Wealth Partners website, our Internet server may automatically record details about any computer used to access the website (such as the IP address, domain name and browser type), the date and time of access, and details of the information downloaded. This information may be used for internal statistical purposes and to improve this website.

If you have any questions about privacy, please contact our Privacy Officer by writing to:

Privacy Officer
Tooronga Village

Suite 1.01, 1 Crescent Road

Glen Iris, Victoria, 3146

How to make a Complaint

Hamilton Wealth Partners has a Complaints Handling Policy which is available on our website, and you may obtain a copy of free of charge. This policy provides information as to how we investigate and respond to your complaint. If you have a complaint, you should address it to:

Mail: Complaints Officer
Tooronga Village

Suite 1.01, 1 Crescent Road

Glen Iris, Victoria, 3146

Email: information@hamiltonwealth.com.au

If you do not feel that you have received a satisfactory outcome, you have the right to take your complaint in writing to:

Australian Financial Complaints Authority (AFCA)

Mail:	GPO Box 3, Melbourne VIC 3001
Toll free:	1800 931 678
Website:	www.afca.org.au

Insurance arrangements in place

Hamilton Wealth Partners has in place Professional Indemnity Insurance cover in accordance with S912B of the Corporations Act.

HAMILTON WEALTH PARTNERS