



Hugh Robertson

Authorised Representative Number 342586

Adviser Profile V1.0 | 27/03/2025

Centaur Financial Services Pty Ltd

Corporate Authorised Representative Number
342372

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Abundant Wealth Partners Pty Ltd (ABN 35 680 570 487 | AFSL 564749) authorises your financial adviser to distribute this document. This document forms part of and should be read in conjunction with the Abundant Wealth Partners Financial Services Guide (FSG).

About Me

I, Hugh Robertson, am an Authorised Representative of Centaur Financial Services Pty Ltd ("my Practice") which is a Corporate Authorised Representative (No. 342372) of Abundant Wealth Partners Pty Ltd.

I have worked in the financial services industry since 2002 and became an adviser of Abundant Wealth Partners Pty Ltd on the 27th of March 2025. I am also a member of the Financial Advice Association Australia (FAAA).

I hold the following qualifications:

- Bachelor of International Finance (Accounting)
- Master of Financial Planning (MFP)
- Master of Business Administration (MBA)
- CERTIFIED FINANCIAL PLANNER (CFP®)
- Certified Investment Management Analyst® (CIMA®)
- SMSF Specialist Advisor (SSA®)
- Advanced Diploma of Financial Planning
- Certificate of ASX Securities
- Certificate of Margin Lending Certificate IV in Financial Services (Finance/Mortgage Broking)
- ASIC Financial Adviser Exam
- Certificate of Ethics & Professionalism in Financial Advice

Awards:

- I was awarded the Association of Financial Adviser's (AFA) Financial Adviser of the Year in 2018, and Independent Financial Adviser (IFA) Goals-Based Adviser of the Year in 2019 and Investment Adviser of the year in 2024. In 2018, 2019, 2020, 2021, 2022 and 2024 I was nominated as one of the Top 50 Most Influential Advisers in Australia by Financial Standard. In 2022, 2023 and 2024 I was also awarded a place on the Barron's Top 100 Financial Advisers list. The Top 100 Financial Advisers list is a collaboration between The Australian and its corporate cousin, Barron's, a 101-year-old American magazine for investors.

Authorisations

I am authorised in the following financial services and products:

- Superannuation and Retirement Planning
- Self-Managed Superannuation Funds
- Retirement Savings Account Products
- Cash and Term Deposits
- Managed Investments/Managed Investment Schemes
- Margin Lending Facility
- Life/ Risk Insurance
- Centrelink/Veterans Affairs Assistance
- Budgeting and Cashflow Management
- Debt Management
- Government Debentures, Stocks or Bonds
- Listed Securities (shares and other products)

Remuneration

I am remunerated by:

- Salary, Bonus, Distributions

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	\$10,000	
Hourly Rate	\$660	
Remuneration	Initial	Per Annum
Adviser Service Fee	Up to \$25,000	Up to \$25,000
Adviser Service Fee (asset based)*	Up to 1.1%	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.

^^Based on a % of the insurance claim paid.



Benefits, interests and associations

Centaur Financial Services will neither pay a third party nor receive payments from a third party for any referrals.

At the date of my advice, I am a Director and Shareholder of the following entities and may be entitled to receive distributions:

- Abundant Wealth Partners Pty Ltd
- Centaur Financial Services Pty Ltd
- Aspen Asset Management Pty Ltd

Aspen is the model manager for the Abundant Wealth Partners Model Investment series which may be utilised in investment recommendations in your advice. As a shareholder their associated entities may be entitled to dividends from Aspen.