

FSG PART 2 - ADVISOR PROFILE

DATE OF ISSUE: 17 FEBRUARY 2026



FINANCIAL SERVICES GUIDE

**BOSTON GLOBAL
WEALTH**

This Adviser Profile is Part 2 of the Financial Services Guide (FSG) and should be provided to you with FSG Part 1. These two documents (Part 1 and 2) complete the FSG.

This Adviser Profile sets out my contact details, professional details, the services and products I provide and how I am paid. Most importantly it's a snapshot of who I am and how you can contact me.

My Details

AUTHORISED REPRESENTATIVE NUMBER: 1002594

Name: Scott Taylor

Business Name: Boston Global Wealth Pty Ltd

Address: Level 8 Suite 2, 10-14 Spring Street, Sydney NSW 2000

Postal Address: Level 8, 10-14 Spring Street Sydney NSW 2000

Phone: (02) 8348 3489

Mobile: 0402 235 028

Email Address: Scott@bostonglobalwealth.com.au

Website: www.bostonglobalwealth.com.au

Qualifications

- Certified Financial Planner (CFP)
- Master of Financial Planning
- Graduate Diploma of Financial Planning

Professional Memberships

- Financial Advice Association of Australia (FAAA)

Experience

With over 17 years' experience as an adviser providing complex strategic and investment advice, I bring a wealth of knowledge, skills and commitment to ensure clients are well informed and on a path to financial optimisation.



Boston Global Wealth Pty Ltd (Rep No. 1381023) has been appointed as a corporate authorised representative of Advisory Circle Proprietary Limited (Advisory Circle) AFSL No.513052. The contact details of Boston Global Wealth Pty Ltd are listed above. I have also been appointed as an authorised representative of Advisory Circle to provide financial services on its behalf and am authorised by Advisory Circle to distribute this FSG.

My Services

I am authorised to provide the following services:

- Financial Advisory / Planning
- Life Insurance Advice
- Investment & Gearing Advice
- Superannuation Advice
- Retirement Planning Advice

I am authorised to provide financial product advice and deal in the following product types:

- Basic and non – basic deposit products
- Debentures, stocks or bonds issued or proposed to be issued by a government
- Life Insurance Risk
- Life Insurance Investment
- Managed Investments, including Investor Directed Portfolio Service (IDPS)
- Retirement Savings Accounts
- Securities
- Superannuation (not including SMSF)
- Standard Margin Lending Facility

How to provide me your instructions

You may specify how you would like to give me instructions on buying or selling the financial products listed under "My Services" by telephone or email. Please refer to my contact details above.

Fees & Commissions paid to Advisory Circle

COMMISSIONS

Initial commissions paid to Advisory Circle

Advisory Circle may receive initial commissions from the product providers if you decide to purchase a product I recommend. The amount of initial commission is calculated as a percentage of the premium paid by you. The commission is paid by the Insurer when you purchase the insurance.

Initial commissions, where permitted by law, are calculated as follows:

- Life Insurance risk products: between 0% – 66% (GST inclusive) of the premium that you pay.

Ongoing commissions paid to Advisory Circle

Ongoing commissions may be paid regularly by the product provider for the length of time that you hold the product. They are usually paid to Advisory Circle by the product provider out of the revenue the product provider earns.

Ongoing commissions, where permitted by law, are calculated as follows:

- Life Insurance risk products: between 0% and 22% (GST inclusive) of the renewal premium. For level commission arrangements this will be up to 30% (GST inclusive) of the renewal premium.

For example, if an insurance product is recommended and you pay a premium of \$500, then the total “upfront” commission paid by the product issuer to Advisory Circle will be between \$0 and \$330. Thereafter, the “ongoing” commission paid to Advisory Circle will be between \$0 and \$110 (assuming upfront commission arrangements and there is no change to the premium you pay in subsequent years).

FEES

Fees may be charged for the services I provide which will be agreed upon and confirmed to you prior to any service provided. Fees may relate to providing a specific piece of advice and/or for further advice services provided.

Based level and structure of fees varies from client to client, depending on factors which include the complexity of the work, time involved and resources required.

Our current fees and charges (GST inclusive) are:

Advice Preparation Fees

Fees for the preparation of your advice may range from \$3,300–\$30,000

Advice Implementation Fees

Fees for the implementation of your advice may be a set fee between \$1,650 and \$30,000.

Alternatively, our implementation fee can be calculated as a percentage of your total portfolio ranging between 0.55% and 3.50% and we may receive brokerage fees from investments placed. .

The fee charged may also be in the form of a brokerage fee charged as a percentage ranging between 0.55% to 1.1% with a minimum trade cost of \$125.

The exact amounts of fees and charges and initial and ongoing commissions for the products you have purchased as a result of my recommendation to you will be detailed in your Statement of Advice.

Annual Service Fees

If you have an annual service arrangement, service fees may be:

- a fixed fee from \$2,200 – \$30,000 and is payable in one lump sum or in instalments; or
- a fee calculated as a percentage of your total funds under advice between 0.55% pa and 3.50% pa payable in one lump sum or in instalments; or
- a fee calculated at an hourly rate based on the time we have spent providing services to you.

Fees related to annual service arrangements will be outlined and agreed to in your Client Service Agreement.

How my associates and I are remunerated

When Advisory Circle receives either a fee or an initial or ongoing commission as a result of a recommendation I have made to you, Boston Global Wealth Pty Ltd is paid 30% of the commission and fees paid to Advisory Circle.

I am an Individual Authorised Representative sub-authorised under Boston Global Wealth Pty Ltd and the AFSL pays me 70% of the fees received and discretionary bonuses from the commissions and fees received. Any bonus I may receive will be conditional upon satisfaction of a range of performance criteria. I may also be entitled to shares within Boston Global Wealth.

Other benefits I may receive

As an authorised representative of Advisory Circle I may receive other benefits, including information technology software and support, professional development programs and conferences. I may also be entitled to other incentives including entertainment benefits, valued at under \$300. Where required by law, such benefits will be recorded in an Alternative Remuneration Register which is available to you on request.

Referrals

Scott Taylor does not receive any referral fees or commissions from third-party service providers. Boston Global Wealth Pty Ltd and associated entities may receive referral fees, corporate rebates, placement fee or brokerage fees from investments placed.

Offshore Resourcing Disclaimer

We use offshore support, including teams in countries such as the Philippines, to assist with administrative tasks and paraplanning services, such as advice document preparation and research. We take privacy and security seriously. All offshore providers are subject to strict confidentiality agreements, and we use secure systems to protect your personal information in line with legal and industry standards.

Contact Us
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