

Adviser Profile

Financial Services Guide, Part 2

This Adviser Profile forms part of, and should be read together with, the Walker Lane Financial Services Guide (Part 1).

Practice	Vero Private Wealth Pty Ltd
ABN	69 679 227 671
ASIC Corporate Authorised Representative No.	001311157
Authorised by	Walker Lane Pty Ltd, ABN 70 626 199 826, AFSL 509305



YOUR ADVISER

Miles Tauber

Founder and principal adviser

ADVISER IDENTIFICATION NUMBER (ASIC)

000235714

QUALIFICATIONS

- Diploma of Financial Services (Financial Planning)
- Advanced Diploma of Financial Planning
- Accredited Listed Product Adviser Program

About Miles

Miles Tauber began his career in financial services in 1996, in a practice he started with his father, and obtained his first licence in 2001 with Colonial Financial Services, which later became Financial Wisdom Pty Ltd.

In 2002, Miles founded Nextstep Financial Services Pty Ltd, which he led with his partners and staff until its acquisition by Sterling Planners Pty Ltd in April 2018. In 2024 he established Vero Private Wealth Pty Ltd, authorised by Walker Lane Pty Ltd.

Miles advises professionals, business owners and families. Many of his clients have been with him for more than twenty years.

"My job is to tell clients the truth about their money, and then help them do something useful with it. That means listening first, explaining things plainly, and staying with clients as their lives change, through the good years and the hard ones."

Services and products

Miles is licensed to provide financial product advice on the following services:

- Wealth creation strategies
- Life insurance advice
- Superannuation strategies
- Debt reduction strategies
- Cash flow management
- Retirement planning
- Aged care strategies
- Estate planning strategies
- Tax (financial) advice

Miles can advise in the following products:

- Basic deposit products
- Debentures, stocks and bonds
- Life insurance (personal and business)
- Managed investments
- Investor Directed Portfolio Services (IDPS)
- Retirement Savings Accounts (RSA)
- Securities
- Superannuation

Benefits, interests and associations

The financial planning business and I do not have related parties, shareholdings or referral arrangements that may influence my advice. Neither the business or I pay or receive referral fees.

Privacy statement

In addition to the information provided in the Walker Lane FSG on how we collect, hold, use and disclose your personal information, and how we manage this information, further details around privacy are available at www.walkerlane.com.au

Remuneration and fee structure

I AM REMUNERATED BY

- Salary and dividends

The cost of providing a financial product or service to you will depend on the nature and complexity of the advice, financial product and/or service provided. Generally, whenever your Adviser provides a recommendation for a financial product or service, your Adviser may be remunerated through either:

- An initial fee for service; or
- An ongoing fee for service; or
- An implementation fee; or
- Insurance commissions; or
- A combination of any of the above.

Details of the ranges and amounts of remuneration are set out below. Amounts are inclusive of GST.

Type of Remuneration	Initial	Ongoing
Hourly Rate	\$450.00	\$450.00
Asset Based Fees*	0% to 1.10%	0% to 1.10%
Insurance Commission^	0% to 66%	0% to 35%

* based on a % of funds invested

^ 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.

Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply.

All fees or commissions are initially paid to Walker Lane before being distributed in part to Vero Private Wealth Pty Ltd.

Contact

Practice	Vero Private Wealth
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Email	miles@veroprivatewealth.com.au