

# Adviser Profile



## William James Mills

Authorised Representative: 268734

## Price Financial Intelligence Pty Ltd

Australian Financial Services Licence: 402367

### My Authorisations

William has been approved by the licensee to act under the following authorization:

- Provide financial advice
- Arrange for a person to deal in financial product
- Apply for, acquire, vary or dispose of a financial product on behalf of another.

### In respect of the following classes of product:

- Deposit and payment products
- Life insurance risk products
- Life insurance investment products
- Superannuation products
- Retirement saving accounts
- Government debentures, stocks or bonds
- Interests in managed investment schemes
- Investor Directed Portfolio Services
- Securities
- Managed Discretionary Accounts
- Standard Margin Lending Facility

### Qualifications

William is a qualified accountant and tax agent, and is the principal of Price Accounting Services, well established in practice for 35 years. William also has a Diploma of Financial Services (Financial Planning).

### My Remuneration and Charges

The Licensee passes on to my employer 50% of the fees and commissions which are a result of my recommendations.

A fee or commission may be charged for the services I provide or a combination of the two may apply. The level of fees and

commission will vary with the service provided and may be subject to negotiation but the following can be taken as a guide.

***This Adviser Profile forms an essential part of our Financial Services Guide and is not complete without it.***

***For a full Fee Disclosure, please refer to our Financial Services Guide.***

### Our Benefits

We have an association with IOOF / Lonsdale for continuous training and professional development.



William established this practice in April 1983 in the Marketplace Shopping Centre at Pennant Hills, Sydney.

William notes: *"Many of our clients today, became clients in those early years and we still enjoy very close relationships on an ongoing basis. Many of our accounting clients have become our financial planning clients."*

### My Contact Details

<b>Business Address</b>	Price Financial Intelligence Pty Ltd Unit 11, 1 Central Avenue, Thornleigh, NSW 2120		
<b>Postal Address</b>	P O Box 750, Pennant Hills, NSW 1715		
<b>Business Phone</b>	(02) 9875 2444	<b>Business Fax</b>	(02) 9481 0594
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