



David Mitchell Yeates Financial Advisor



VOGUE ADVISORY GROUP

Office location: Suite 1, Level 2, 21 Lake Street, Varsity Lakes, Queensland, 4227

PO Box 478, Varsity Lakes, QLD, 4227

T: 1300 709 985

M: 0409 351 344

E: david@vogue-fs.com.au

W: <https://www.vogue-fg.com.au/>

Your financial adviser, David Mitchell Yeates (ASIC number 000239539), is an authorised representative of MoneySherpa AFSL 451289 and Tax (Financial) Adviser: 25517476

Profile:

I joined Vogue Advisory Group in 2022 with over 21 years' experience in the financial services industry. After completing a Bachelor of Commerce (Accounting and Economics), I worked for major banks private companies and for myself. I have provided specialised insurance, superannuation and investment advice and portfolio protection strategies to high net worth and SMSF clients. I am a highly motivated individual who is passionate about my clients achieving financial security and freedom. I have a determination to build a long-lasting relationship with my clients which is as much a priority as my ambition to develop a strategic financial plan that is secure and attainable. When I am not working, I enjoy keeping fit, the beach, camping, fishing and anything outdoors really.

Strategies:

- Guidance on budgeting and goal setting
- Savings and wealth creation strategies
- Investment planning
- Superannuation planning
- Pre-retirement planning
- Retirement planning
- Estate planning considerations
- Centrelink planning
- Risk and insurance analysis
- Business succession planning
- Salary packaging advice
- Gearing strategies
- Managed discretionary accounts

Advice I can provide:

I can provide you with strategic advice as well as arrange the types of financial products listed below. I can help you to identify the types of services and products that will be appropriate to meet your financial goals. In addition, you can choose whether to receive advice about a range of needs all at once, or we can provide advice about only those needs that are most important to you so that your most important goals are achieved first. Further advice can then be provided over time about any other needs or goals as required.

Products:

- Deposit and payment products (for example term deposits, cash management accounts and non-cash payment products)
- First home saver accounts
- Retirement income streams
- Direct fixed interest
- Retail & wholesale managed investment schemes
- Socially responsible investments
- Hedge funds
- Master trust products
- Limited investment guarantee
- Superannuation products
- Personal and group insurance
- Business succession insurance
- Margin lending facilities
- Direct shares

How the Advisor is paid: *Moneysherpa retains 5% remuneration of any advice, service fees or commissions received by the insurer. Moneysherpa pays 95% of any ongoing remuneration to the Vogue Advisory Group Corporate Authorised AR of the balance. The advisor, David Mitchell Yeates (AR 000239539), is an employee of Vogue Advisory Group and as such receives a regular income rather than remuneration directly linked to the advice provided.*