



Primary Wealth Management

**FINANCIAL SERVICES
GUIDE – PART 2
(ADVISER PROFILE)
VERSION 1.0**

30 JANUARY 2026

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Version 1.0, 30 January 2026

This document must be read in conjunction with Part 1 of the Financial Services Guide (FSG).

This Financial Services Guide (FSG) – Part 2 (Adviser Profile) contains specific information about Primary Wealth Management Pty Ltd (ABN 71 694 757 885) and your individual financial adviser. Part 1 of the FSG contains important information about Guidance Advisers Pty Ltd, the Australian Financial Services (AFS) Licence No. 000540341, which authorises us to provide financial services to you. Together, Part 1 and Part 2 form the complete Financial Services Guide.

Your financial services are provided by:

- Primary Wealth Management (Corporate Authorised Representative No. 001319586); and
- Its Authorised Representatives (Financial Advisers) listed in this document.

Primary Wealth Management is a Corporate Authorised Representative of Guidance Advisers Pty Ltd (ABN 65 653 468 832, AFS Licence No. 000540341).

The distribution of this Financial Services Guide (FSG) – Part 2 (Adviser Profile) has been authorised by Guidance Advisers Pty Ltd.

Contact Information

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Email:	support@primarywealth.com.au
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Benjamin Stagg

Ben is an Authorised Representative (No. 001312435) of Guidance Advisers Pty Ltd.

Ben is employed by Primary Wealth Management Pty Ltd, which is a Corporate Authorised Representative (No. 001319586) of Guidance Advisers Pty Ltd (AFS Licence No. 000540341).

Qualifications

Ben Stagg is a qualified financial adviser who meets the education and training standards set by the *Corporations Act 2001*.

Ben holds the following qualifications:

- Graduate Diploma of Financial Planning
- Margin Lending Specialist (Kaplan)

Ben has also passed the Financial Adviser Exam (formerly known as the FASEA Exam).

Financial Services

Ben is authorised by Guidance Advisers to provide financial product advice and deal in financial products (including applying for, acquiring, varying, or disposing of products) for the following:

- Deposit and Payment Products (including Basic Deposit Products)
- Government Debentures, Stocks and Bonds
- Securities
- Managed Investment Schemes (including IDPS)
- Superannuation and Retirement Savings Accounts
- Life Risk Insurance Products (Life, TPD, Trauma and Income Protection)

Ben can assist you with strategies relating to:

- Holistic Financial Planning and Wealth Creation
- Pre-Retirement and Retirement Planning
- Personal Insurance and Risk Protection
- Superannuation
- Debt Management

Ben does not provide legal advice (such as drafting Wills), tax agent services, general insurance, or direct property advice. Where appropriate, Ben may refer you to other professionals such as solicitors or accountants for these services. We are not responsible for the advice they provide.

Remuneration

Ben is remunerated by a salary and does not receive commissions directly. Ben may be eligible to receive a discretionary annual performance bonus.

This bonus is determined using a 'balanced scorecard' approach, which ensures that remuneration is not solely determined by business revenue. The scorecard heavily weights non-financial criteria, including:

- Meeting regulatory obligations and internal standards;
- The quality of advice provided to clients; and
- Client satisfaction and retention rates.

Contact

If you need to contact Ben, you can reach out using the following information:

Phone: 1300 430 837

Email: ben@primarywealth.com.au