

Adviser Profile

Stefano Zagami



This profile is part of the Financial Services Guide (FSG) and should be read in conjunction with the FSG.



Meet your adviser

Your adviser is Stefano Zagami (Steve), an Authorised Representative (AR No. 246221) of Vantage Wealth Management Pty Ltd as trustee for the Vantage Wealth Management Unit Trust (Vantage). Advice is provided by him through Vantage a Corporate Authorised Representative (AR No. 337994), of VWM Financial Services Pty Ltd (AFSL No. 345744).

Steve commenced his career in financial services at the ANZ Bank in 1982. He holds a Diploma of Financial Services, is a SMSF Specialist Adviser, and Associate of the Financial Advice Association Australia (FAAA). Steve maintains ongoing commitment to building knowledge. The early career mantra of 'service to others for betterment of their lives', is the underlying credo that has kept Steve motivated over a long time.

Steve specialises in assisting clients in the following areas:

- Life Risk Insurance planning strategies for families and small business owners
- Superannuation accumulation and retirement income planning strategies
- SMSF investment strategy and portfolio design
- Strategic investment planning, and tax effective portfolio construction using direct, income producing securities

Steve is married to Marisa. They have two sons and two grandchildren.

What financial services are we authorised to provide and what products do these services relate to?

Vantage, and Stefano Zagami, are authorised to provide the following financial services to retail and wholesale clients:

Financial product advice and deal by applying for, acquiring, varying, or disposing of a financial product on behalf of another person in:

- Basic deposit products;
- Non-basic deposit products;
- Government debentures, stocks or bonds;
- Investment Life Insurance products;
- Life Risk Insurance products;
- Interests in managed investment schemes including IDPS;
- Retirement savings accounts;
- Securities;
- Standard margin lending facilities; and
- Superannuation;

to retail and wholesale clients.

Stefano Zagami is authorised to advise and deal in all the financial products listed above. He is not authorised to provide advice on direct real property and digital assets such as cryptocurrencies, NFTs and other tokens.

How will you be paid for the services provided to me?

Stefano Zagami is an Authorised Representative employee of Vantage receiving a fixed salary and he may be entitled to a bonus. His remuneration package is not linked nor related to specific investment recommendations but to individual performance and the profitability of Vantage.

Do any relationships or associations exist which might influence you in providing me with the financial services, other than outlined within the Financial Services Guide?

No.