



Representative profile – Version 8.0

Preparation Date 1 June 2026

This document forms the second part of the Oreana Financial Services Guide. This FSG is divided into two parts; both must be read together. This document is designed to clarify who we are and what we do, and to help you decide whether to use our services.

Who We Are

Your financial adviser(s) are Representatives of and offer services on behalf of Oreana Financial Services Pty Ltd, AFSL License No. 482234:

- Julian Battistella Authorised Representative No. 320799
- Declan Freeman Authorised Representative No. 1271827

The Financial Services that the above financial advisor(s) offer are provided by Battistella Financial Services Pty Ltd, ABN 78 128 239 305, trading as Battistella Financial Services, Authorised Representative (AR) No. 320798.

Battistella Financial Services specialises in providing advice to Executives, Professionals, Expatriates, Business Owners and Retirees. Our range of services and advice is designed to enhance your financial well-being and help you manage your financial complexity, allowing you to focus on your business, family, and/or retirement needs.

Oreana has authorised your adviser to provide you with this Financial Services Guide.

About Julian Battistella

Julian has over 35 years of experience working in the financial services industry, with expertise across strategic financial planning, investment management, superannuation, estate planning, banking, and small business lending.

Sydney
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Level 17, 627 Chapel Street
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Prior to establishing Battistella Financial Services in 2007, Julian held roles with Deutsche Bank AG, Perpetual Private Clients, Wilson HTM Investment Group, and ANZ Banking Group.

At Wilson HTM Investment Group, Julian established and led the Melbourne financial planning division from 2002. Working closely with tax advisers, lawyers, and investment specialists, he developed a practice focused on delivering integrated advice to high-net-worth clients. During this period, he was recognised as Money Management Financial Planner of the Year (2007), following finalist placements in 2005 and 2006.

Julian's advisory focus is centred on assisting clients—both working professionals and retirees—who are seeking to build, preserve, and transition wealth in a structured and sustainable manner.

Qualifications and Professional Designations

Julian holds the following qualifications and professional memberships:

- Graduate Diploma of Financial Planning (Deakin University, 2021)
- Diploma of Financial Planning (1997)
- Certified Financial Planner® (CFP®), Financial Planning Association of Australia (since 1999)
- SMSF Specialist Advisor®, SMSF Association (2007)
- Fellow, SMSF Association (2021)
- Registered Tax (Financial) Adviser / Tax Agent (since 2012)
- Justice of the Peace (JP)
- Successfully completed the FASEA Financial Adviser Examination (2020)

Industry and Governance Roles

Julian has held a range of industry and governance positions, including:

- Member, MLC National Advisory Council (2006–Current)
- Chair, Financial Planning Association CFP Curriculum Taskforce (Professionalism, Ethics and Compliance)
- Various committee roles with the Financial Planning Association of Australia
- Member, Finance Committee, St Kevin's College Toorak (2013–present)

About Declan Freeman

Declan joined Battistella Financial Services in 2022 and brings over 15 years of experience in the financial services industry.

He is a Financial Planner with a strong technical foundation across wealth creation, risk management, self-managed superannuation, retirement planning, aged care, and estate planning.

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Declan works closely with clients to develop tailored strategies designed to support long-term financial outcomes. He is focused on delivering considered, high-quality advice that is aligned to each client's individual circumstances and objectives.

He holds a Bachelor of Business (Financial Planning) with Distinction from RMIT University, an Advanced Diploma of Financial Planning, and a Diploma of Financial Planning. Declan is also an Accredited Aged Care Professional.

What we do

We are authorised by Oreana Financial Services to provide financial advice in relation to:

- Wealth Accumulation
- Income & Asset Protection
- Tax Strategies
- Superannuation (Inc. SMSFs)
- Retirement & Redundancy Planning
- Estate Planning
- Aged Care
- Government Benefits
- Debt Management
- Margin Lending
- Expatriate Financial Planning

What financial products and services are we authorised to provide?

We are authorised to provide personal financial advice, general financial advice, and transact on your behalf (dealing) in relation to the following types of financial products:

- Basic / Non-Basic Deposit Products
- Debentures, stocks or bonds issued or proposed to be issued by a government
- Life products - Investment Life Insurance
- Life products – Life Risk Insurance
- Managed investment schemes, including Investor Directed Portfolio Services (IDPS)
- Retirement savings accounts ("RSA") products
- Securities
- Superannuation
- Standard Margin Lending



BATTISTELLA
financial services

How we charge for our services

All fees and commissions are inclusive of GST, and the fees may be higher than those disclosed below in complex cases. In these instances, we will inform you of the exact fee payable promptly in writing.

Schedule of fees

Type of advice	Fee charged
Initial consultation	At our expense
Initial advice (advice preparation and implementation)	Fees may range from \$3,300 - \$9,900 and will vary depending on the level of complexity of your situation. The advice preparation fee is charged for the preparation for a written Statement of Advice.
Implementation (fee for advice)	If you elect to pay us a fee for advice the following fees will apply. The fees are based on time and complexity taken to implement your recommended strategy: The minimum fee charged is \$2,200 while the maximum fee is \$9,900, unless otherwise negotiated.
Ongoing / Annual advice	Battistella Financial Services offers our clients an ongoing advisory service or an annual service depending on your needs. The ongoing or annual advice fee will be based on the level of service required, the frequency of the review and the complexity of the advice. The Ongoing or annual Advice Fee may range from \$7,700- \$39,999 pa, unless otherwise negotiated.
Ad hoc advice	The fees for the provision of ad hoc advice not covered by an Ongoing Service arrangement will be charged on an hourly basis at a rate of \$186 - \$655 (as at 1/7/2025). Our hourly rates are indexed by 4% per annum.
Insurance products	Wherever possible, we do not receive any form of payment or commission from insurance providers, policies or 3 rd parties. In the event this is



	unavoidable, we will always rebate this payment to you by reducing your ongoing Adviser Service Fee on a dollar for dollar basis.
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How I am paid – Julian Battistella

As a director of Battistella Financial Services, I am entitled to receive director fees or distributions from Battistella Financial Services Pty Ltd and Battistella Advisory Services Pty Ltd ATF Battistella Financial Services Unit Trust. I do not receive any bonuses, benefits or additional payments for recommending specific products or providers and the remuneration scheme of which I am part has been designed to ensure that your interests are prioritised, conflicts are minimised and that my advice is not inappropriately influenced.

How I am paid – Declan Freeman

I receive a salary as an employee of Battistella Financial Services Pty Ltd. I may also receive a performance bonus based on criteria including the quality of my advice, my compliance with my ethical and professional obligation, client retention rates and my contribution to the financial performance of Battistella Financial Services Pty Ltd. I do not receive any bonuses, benefits or additional payments for recommending specific products or providers and the remuneration scheme of which I am part has been designed to ensure that your interests are prioritised, conflicts are minimised and that my advice is not inappropriately influenced.

How we manage conflicts of interest

We recognise that conflicts of interest can occur, particularly when we receive fees, commissions, or have relationships with product providers or related entities. We manage these conflicts through a combination of factors such as designing our remuneration structures so that they do not incentivise the recommendation of specific products or strategies, basing our advice on your objectives, financial situation, and needs and ensuring that our advice is appropriate and in your best interests.

Where we are not confident that a conflict can be effectively managed, we will not proceed but will refer you to another provider.

Referral relationships

Where we refer you to a third party, we will only do so where we reasonably believe the referral is in your best interests. You are under no obligation to act on the referral, and we will not make a referral where the benefit we receive might influence our advice.

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Name of referral partner	Services	Payment received for referral
Martin Dubler	Estate Planning	n/a

Associated & related entities

The table below outlines the associated or related entities we are involved in and the details of any direct or indirect benefit we may receive if we refer you to them.

Regardless of any benefits we may receive, we will not refer you unless it is in your best interest and necessary for you to achieve your goals and objectives.

Table – Other Business Activities, Associated Entities and Related Third Parties:

Name of Entity	Nature of association
Battistella Advisory Services Pty Ltd As Trustee For the Battistella Financial Services Unit Trust	<p>Battistella Financial Services Pty Ltd (BFS) pays an ongoing Licence Fee to Battistella Advisory Services Pty Ltd ATF Battistella Financial Services Unit Trust (BAS). This payment relates to the engagement of BAS to provide a range of administration services to the clients of BFS. BAS is a 100% related party of BFS.</p> <p>Julian Battistella is a Director of Battistella Advisory Services Pty Ltd and has a controlling shareholding in the entity. As a result, Julian Battistella will benefit from indirect distributions made from the Battistella Financial Services Unit Trust.</p>

Please note that Oreana Financial Services is not responsible for the advice and services provided by Battistella Advisory Services Pty Ltd ATF Battistella Financial Services Unit Trust.

Payment of Fees

All fees and commissions disclosed in this FSG are paid to Oreana, who pays all fees and commissions it receives to Battistella Financial Services Pty Ltd.

For more information or if you have any questions, please contact us at:

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