Financial Adviser Profile

Overview

Leanne is passionate about helping her clients succeed in life, whatever their goals and aspirations may be. Sometimes it is great to have a caring advocate to offer guidance through every step of life's journey and celebrate those successes and life changing 'wins' whilst having best interests at heart. It is also reassuring to have someone who can offer guidance and support and help create a backup plan, when life throws lemons and things do not work out as planned.

Having a demonstrated history of working in the finance industry, Leanne started her journey as a Financial Planner with the Commonwealth Bank. Leanne is a strong finance professional with a respected personal brand. She has won many awards during her career for excellence and her clients are her number one focus.

To add, in 2021 Leanne won the Financial Planner of the Year (FPA) Award for providing consistent and professional assistance for those in need throughout the pandemic.

Leanne created 2020 Wealth Pty Ltd with the perfect vision to provide ethical and holistic advice to exceed professional standards. She specialises in Retirement Planning, Superannuation, Investing and Aged Care as well as having a sound understanding of Centrelink rules.

Leanne Bielik is a Sub-Authorised Representative of 2020 Wealth Pty Ltd, Corporate Authorised Representative No. 1281869. Authorised Representative No. 1002785.

Qualifications

Leanne holds a Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Leanne Bielik is a member of the Financial Planning Association (FPA) and abides by their code of professional conduct and ethics.

Authorisations

Leanne Bielik is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Retirement Savings Accounts ("RSA") products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government; and
- Superannuation.

Leanne Bielik
2020 WEALTH

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2020 Wealth Advice Fees and Charges

Leanne Bielik will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.

Leanne's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.

Leanne provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

2020 Wealth Pty Ltd pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Leanne Bielik is a Director of 2020 Wealth Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Leanne May Receive

From time to time Leanne Bielik may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than $300. A register listing the details of any non-cash benefits between $100 and $300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

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