



PRIMEWEST MANAGEMENT LTD

Financial services guide (FSG)

AFS licence no. 250963

Date prepared: 9 February 2021

Important information

This Financial Services Guide (FSG) is an important document and has been prepared by Primewest Management Ltd ABN 63 091 415 833 (Primewest Management, we, us or our), the holder of Australian financial services (AFS) licence number 250963. This FSG is designed to assist Primewest Management's retail clients in deciding whether to use the financial services that we provide. The information in this FSG is current as at the date this FSG was prepared, as shown on the front cover of this document.

Who we are

Primewest Management is a part of Primewest Group. Primewest Group is listed on the Australian Securities Exchange (ASX:PWG) and is one of Australia's most active and successful property fund managers with over \$4.9 billion of assets under management.

Information in this FSG

Primewest Management operates a number of managed investment schemes, including schemes that are available for investment by retail and wholesale clients, as well as schemes that are only available for investment by wholesale clients. The information in this FSG relates to the financial services Primewest Management provides to retail clients and is designed to assist you in making a decision about whether to acquire a financial product or receive a financial service from us as a retail client.

If you invest in a scheme operated by Primewest Management or otherwise receive a financial service from Primewest Management as a wholesale client, then please contact us using the details below if you have any questions or would like any further information regarding the financial services we provide to you.

The financial services we provide

Primewest Management provides financial services as part of its funds management business. Primewest Management is authorised to provide the following financial services to retail and wholesale clients by its AFS licence:

1. Provide general financial product advice

Primewest Management is authorised to provide general advice in relation to the following financial products:

- (a) Basic deposit products.
- (b) Interests in managed investment schemes, excluding investor directed portfolio services (IDPS).
- (c) Securities.

2. Deal in a financial product

Primewest Management is authorised to deal in a financial product by issuing, applying for, acquiring, varying or disposing of a financial product in respect of the following classes of financial products:

- (a) Derivatives.
- (b) Interests in managed investment schemes, excluding IDPS.
- (c) Securities

Primewest Management is also authorised to deal in a financial product by applying for, acquiring, varying or disposing of a financial product on behalf of another person in respect of the following classes of products:

- (a) Basic deposit products
- (b) Derivatives.
- (c) General insurance products.
- (d) Interests in managed investment schemes, excluding IDPS.
- (e) Securities.

3. Operate registered managed investment schemes

Primewest Management is authorised to operate registered managed investment schemes (including the holding of any incidental property) in its capacity as responsible entity, being schemes which hold the following types of property:

- (a) Direct real property.
- (b) Financial assets.

4. Provide a custodial or depository service

Primewest management is authorised to provide a custodial or depository service, other than an IDPS.

General advice only

Primewest Management is only authorised to provide general financial product advice. If you visit our website or contact us, you will receive factual information or general advice only. Any advice we provide is general only and does not take into account your objectives, financial situations or needs. You should consider the appropriateness of any general advice we provide in light of your own objectives, financial situation or needs before acting on the advice.

Product Disclosure Statement (PDS)

In addition to this FSG, an electronic copy of the relevant PDS will be available on our website or you can request we provide a paper copy. The PDS contains information about the features, costs, risks and benefits of the financial product, as well as the fees we will charge in relation to the product. You should read the PDS in full before making any decision about whether to acquire the product. If you have any doubt as to whether an investment is appropriate for you, you should consult your financial adviser or other professional advisers.

The remuneration or other benefits we receive

The only remuneration Primewest Management and other Primewest Group companies will receive in connection with your investment in a product offered by Primewest Group are the fees detailed in the relevant PDS. Primewest Management's employees and directors (or those of any other Primewest Group company) do not receive any commissions in respect of (or attributable to) the provision of financial services to you and are remunerated by salary and bonuses attributable to the performance of Primewest Group's products only.

Primewest Management does not pay commissions to financial advisers or other intermediaries in relation to any product acquired by you.

The compensation arrangements we have in place

Professional indemnity insurance is in place that satisfies the requirements under section 912B of the *Corporations Act 2001* for compensation arrangements. It covers legal liability arising from the financial services we provide to you. It also covers potential liability arising from compensation claims.

Complaints

If you have a complaint about a product or service offered by Primewest Management, then please contact us using the details below:

Complaints Handling Officer
Primewest Management Ltd
Level 1, 307 Murray Street
Perth WA 6000

Telephone: +61 8 9321 7133
Email: enquiries@primewest.biz

The Complaints Handling Officer will ensure your complaint is acknowledged in writing immediately or as soon as practicable and will ensure it receives proper consideration.

Where possible, we will attempt to resolve a complaint at the first point of contact. If this is not possible, you will be notified that your complaint is being investigated and will be advised of the expected resolution date.

We will communicate our final proposal for resolution within 45 days of receiving the complaint. If it is not possible for us to resolve the complaint within 45 days, then we will give you an up-date on the status of your complaint, the reasons for the delay and any further rights regarding your complaint.

Primewest Management is a member (no. 12351) of the Australian Financial Complaints Authority (AFCA), an external complaints resolution service approved by the Australian Securities and Investments Commission. If you are dissatisfied with our response, then you may raise the matter with AFCA. AFCA's contact details are as follows:

Australian Financial Complaints Authority
GPO Box 3
Melbourne VIC 3001

Telephone: 1800 931 678 (free call)
Email: info@afca.org.au
Website: www.afca.org.au

Contact us



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