RWA

Important Information

This page sets out important information about the content on www.roundedwealth.com.au and in our other communications.

Issued by	Date	Version
Rounded Wealth Advisory Pty Ltd	01 September 2026	3.1



All investments involve risk, including fluctuations in market value, changes in investment income and the potential loss of some or all invested capital. Past performance is not a reliable indicator of future performance, and no investment outcome or return is guaranteed.

© 2019-2026 · Rounded Wealth Advisory Pty Ltd · All rights reserved · ABN 32 633 327 143 · AFSL 523251

This page sets out important information about the content on www.roundedwealth.com.au and in our other communications. Please read it together with our Website Terms and Conditions, Financial Services Guide, Privacy Policy and Cookie Policy.

> **General advice warning.** The information on this Website is general information only. It has been prepared without taking into account your objectives, financial situation or needs. Before acting on it, you should consider whether it is appropriate for you and read the relevant Product Disclosure Statement, prospectus or other disclosure document, and Target Market Determination, for any product. All investments carry risk, and you may lose some or all of the money you invest.

01

About this page

1.1 This page applies to www.roundedwealth.com.au, our client portal and online application, and our emails, newsletters, articles, social media posts, videos, seminars and events (together, **our content**). Our content is published by Rounded Wealth Advisory Pty Ltd ACN 633 327 143, ABN 32 633 327 143, Australian Financial Services Licence 523251 (**Rounded Wealth Advisory**, **we**, **us** or **our**).

02

General advice only

2.1 Our content is general information or general advice. It is not personal advice, and it does not consider your objectives, financial situation or needs.

2.2 Before you make an investment decision, you should consider whether the information is appropriate for you, read the disclosure document and Target Market Determination for the product, and consider getting personal advice. If you would like personal advice, please contact us. When we give you personal advice, you will receive a Statement of Advice.

2.3 Nothing in our content is a recommendation to buy, sell or hold any financial product, unless we tell you directly that it is personal advice given to you.

03

Not an offer, and who this content is for

3.1 Our content does not constitute an offer, invitation or solicitation to buy or sell any financial product, except where an offer is made in a disclosure document or under our client terms and conditions.

3.2 Our content is intended for people in Australia. It is not directed at, and must not be relied on by, anyone in a country where its publication or use would be against the law. In particular, it is not an offer to, or for the benefit of, any US person.

04

Investment risk

All investments carry risk. The value of investments, and any income from them, can go down as well as up, and you may not get back the amount you invested.

05

Past performance and forward-looking statements

5.1 Past performance is not a reliable indicator of future performance. Any performance figures are shown for illustration only and may not include all fees, costs and taxes.

5.2 Some of our content contains forecasts, projections, estimates or other forward-looking statements. These reflect our views and assumptions at the time of publication, which may change. Forward-looking statements are not guarantees, and actual results may differ materially.

06

Accuracy and third-party information

6.1 We prepare our content in good faith from sources we believe are reliable. However, we do not warrant that it is accurate, complete or up to date, and it may change without notice. We are not obliged to update our content after it is published.

6.2 Some of our content includes information from third parties, such as market data, prices, ratings, research and index data. We do not verify this information and are not responsible for it. Market prices and data may be delayed.

07

Articles and market commentary

7.1 Our articles, newsletters and market commentary reflect the views of the author at the time of writing. They may differ from views expressed elsewhere by Rounded Wealth Advisory or our Representatives, and they may change without notice.

7.2 Mentioning a company or financial product in our content is not a recommendation to buy, sell or hold it.

7.3 Our directors, Representatives and staff may hold investments in companies or products mentioned in our content. We manage these situations through our conflicts of interest and personal trading policies. We do not receive payments from product issuers for publishing content.

08

Calculators, charts and examples

8.1 Our calculators, charts, tools and worked examples are for illustration only. They rely on assumptions and the information you enter, and the results are not a guarantee or prediction of any outcome. They do not take into account all relevant factors, such as your full financial position, tax or changes in the law.

8.2 Fee examples are illustrative. The fees that apply to you are set out in our Financial Services Guide and, if you receive personal advice, your Statement of Advice.

09

Tax

9.1 We do not provide tax advice. Our content does not take into account your tax position. You should get advice from a registered tax agent or tax adviser before making an investment decision.

10

Product issuers and third-party products

10.1 Where our content is about a financial product issued by another entity, that entity is the issuer and is responsible for the product and its disclosure documents. Any ratings, index data or research from third parties belong to those parties and are used for information only. Their inclusion does not mean the third party sponsors or endorses us, or that we endorse the third party.

11

Links and third-party content

11.1 Our content may include links to, or content from, third-party websites and social media platforms. We do not control these and are not responsible for their content, products, services or privacy practices. A link is not an endorsement.

12

Limitation of liability

12.1 To the extent permitted by law, Rounded Wealth Advisory and its directors, employees and Representatives are not liable for any loss or damage, including loss caused by negligence, arising from use of or reliance on our content.

12.2 Nothing on this page excludes, restricts or modifies any right or remedy you have under the *Australian Consumer Law*, the *Australian Securities and Investments Commission Act 2001* (Cth), the *Corporations Act 2001* (Cth) or any other law that cannot be excluded.

13

Copyright

13.1 Our content is owned by or licensed to Rounded Wealth Advisory and is protected by copyright and other intellectual property laws. You may view, download and print it for your own personal, non-commercial use. You must not reproduce, adapt, distribute, frame or link to it for any other purpose without our written consent, except as permitted by law.

14

Emails and scams

14.1 Our emails are intended only for the named recipient and may be confidential. If you receive one in error, please delete it and tell us.

14.2 We will never ask you to send us your passwords, PINs or one-time security codes. If you receive a message claiming to be from us that you are unsure about, do not respond. Please contact us using the details below, which are also listed on this Website.

15

Contact us

If you have a question about this page, please contact us:

Phone	02 8880 6200 or 1300 050 090
Email	info@roundedwealth.com.au
Mail	Rounded Wealth Advisory Pty Ltd L35 Tower One Barangaroo 100 Barangaroo Avenue Sydney NSW 2000