

Financial Adviser Profile

Overview

Our company has been established as a natural consequence of legislative changes and our specialisation in superannuation, especially in SMSF audits. We pride ourselves that we are small enough to know all our clients in person, yet large enough to provide complete services in superannuation.

Tomas Weiszer is a Sub-Authorised Representative of BeWeiszer Financial Planning Pty Ltd, Corporate Authorised Representative No. 1245768. Authorised Representative No. 1245914.

Qualifications

Tomas Weiszer holds a Diploma in Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Tomas Weiszer is a member of Chartered Accountants Australia and New Zealand, CPA Australia and Tax Institute and abides by their code of professional conduct and ethics.

Authorisations

Tomas is authorised to:

- provide financial product advice on self-managed superannuation funds;
- arrange to deal in an interest in a self-managed superannuation fund;
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
 - making a recommendation that the person establish a self-managed superannuation fund; or
 - providing advice to the person on contributions or pensions under a superannuation product;
- provide class of product advice on the following:
 - superannuation products;
 - securities;
 - simple managed investment schemes;
 - life risk insurance products;
 - basic deposit products.

Tomas Weiszer

BeWeiszer Financial Planning

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BeWeiszer Financial Planning Advice Fees and Charges

Tomas Weiszer may 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.

Tomas's fee for the preparation of 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.

Where financial planning advice fees are payable, Capstone Financial Planning will receive all revenue in the first instance.

BeWeiszer Financial Planning 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. Tomas is a Director of BeWeiszer Financial Planning Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Tomas May Receive

From time to time Tomas 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.