

# Financial Adviser Profile

## Overview

Jason is considered a holistic-approach Financial Planner. His motivation is to assist the majority of Australians to improve their wealth potential and adequately protect themselves and their family against insurable risks.

Jason has decades of financial industry experience with certifications including: Advanced Diploma of Financial Planning; Diploma of Financial Services (Finance & Mortgage Broking Management). Jason is also currently studying his Graduate Diploma in Financial Planning.

Jason has a wealth of experience, with an engaging nature which makes it easy for you to relate and understand the strategies he recommends for your particular circumstances.

Midas Financial Planning aims to provide a quality professional service, delivering information and solutions to clients in a readily understandable format. We pride ourselves on our attention to detail, our level of understanding and compassion, always committed to assisting our clients to reach their financial goals.

Jason Flavel is a Sub-Authorised Representative of Marion J Pty Ltd, Corporate Authorised Representative No. 243141. Authorised Representative No. 405953.

## Qualifications

Jason Flavel holds an Advanced Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Jason Flavel is an Associate Member of Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

## Authorisations

Jason Flavel 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;
- Superannuation; and
- Securities
- Standard Margin Lending Facility.



## Jason Flavel

**Midas Financial Planning**

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## Midas Financial Planning Advice Fees and Charges

Jason Flavel 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.

Jason'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.

Jason provides the option of ongoing reporting and advisory services. This fee is either a minimum of \$2,200 p.a, or 1.10% p.a. of the value of your holding incl. GST. This cost is dependent on the complexity involved, the time required and the value of your holding. You will be notified of the cost involved prior to the commencement of any ongoing services.

Marion J 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. Jason Flavel is a salaried employee of Marion J Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Jason Flavel May Receive

From time to time Jason 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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