

# Financial Adviser Profile



## Overview

Anthony Buckley strives to protect and improve the financial position of his clients so that they may experience the high quality of life afforded by their circumstances. To do this, Anthony offers comprehensive solutions through a long-term relationship which is characterised by a personal and responsive approach.

Anthony has over 20 years of experience in providing advisory services, specialising in the Financial Services Industry. With his background as an Accountant, he has worked for such firms as ANZ Banking Group Limited and PricewaterhouseCoopers. Anthony has been working full-time as a Financial Planner since July 2000, providing strategic personal financial planning solutions for the benefit of his clients, with a focus on wealth creation and protection, and retirement planning.

Anthony is a Sub-Authorised Representative (Authorised Representative No. 230627) of Financial Planit Pty Ltd (Corporate Authorised Representative No. 277345).

## Qualifications

Anthony holds a Bachelor of Business (B.Bus), is a Certified Practising Accountant (Financial Planning Specialist) CPA (FPS), and completed Aged Care Accreditation training with Aged Care Gurus, and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Anthony is also an Associate Financial Planner (Practitioner Member) of the Financial Planning Association FPA (AFP) and abides by their code of professional conduct and ethics.

## Authorisations

Anthony 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
- Standard Margin Lending Facility.

## Anthony Buckley

Financial Planit

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## Financial Planit Advice Fees and Charges

Anthony may be paid by either Financial Planning Advice Fees and/or Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be discussed with you during your initial meeting.

Anthony's fee for the preparation of a Statement of Advice is based on an hourly rate of \$330 incl. GST. You will be notified of the cost involved prior to the commencement of any work if applicable.

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

Financial Planit 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. Anthony is a Director of Financial Planit Pty Ltd and receives a salary/benefit from this company.

## Other Benefits Anthony May Receive

From time to time Anthony 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.