

# Financial Adviser Profile

## Overview

Andrea has worked in the financial planning industry since 1998 and is passionate about building strong and long lasting financial planning relationships where she will partner in achieving her client's particular goals.

Her view is that financial planning is about the whole family, about lifestyle and security that we want to protect and manage well. A financial planner is about partnership and blending professional knowledge with people's wants and goals for their better financial tomorrow.

Andrea Dawson is a Sub-Authorised Representative of Paris Financial Services Pty Ltd, Corporate Authorised Representative No. 357928. Authorised Representative No. 1000476.

## Qualifications

Andrea Dawson holds a Master's in Financial Planning and meets the competency requirements under ASICs Regulatory Guide RG 146.

## Professional Memberships

Andrea Dawson is a member of Association of Financial Advisers (AFA) and abides by their code of professional conduct and ethics.

## Authorisations

Andrea Dawson is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a government
- Superannuation
- Self-Managed Superannuation Funds
- Securities.



## Andrea Dawson

Paris Financial Services

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## Paris Financial Advice Fees and Charges

Andrea 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.

Andrea'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.

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

Paris Financial Services 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. Andrea is a salaried employee of Paris Financial Services Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Andrea May Receive

From time to time Andrea 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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