

Financial Adviser Profile

Overview

Sharon has worked in the financial planning industry since 2001 and is passionate about providing excellent financial advice to individuals and businesses.

Sharon is a Sub-Authorised Representative of Paris Financial Services Pty Ltd, Corporate Authorised Representative No. 357928. Authorised Representative No. 406274.

Qualifications

Sharon is a Certified Financial Planner, and holds a Bachelor of Commerce (Accounting & Finance) and a Bachelor of Arts and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Sharon is a member of the Financial Planning Association of Australia (FPA) and abides by their code of professional conduct and ethics.

Authorisations

Sharon 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;
- Self Managed Superannuation Funds;
- Securities; and
- Standard Margin Lending Facility.



Sharon Tan

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Paris Financial Services Advice Fees and Charges

Sharon 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.

Sharon'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.

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

Other Benefits Sharon May Receive

From time to time Sharon 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.