

# Financial Adviser Profile

## Overview

Katrina has been a Chartered Accountant since 2011.

Originally from country Victoria Katrina has extensive experience working with a wide range of businesses and their owners specialising in taxation, business services and superannuation.

Katrina Johnson is a Sub-Authorised Representative of PMP Wealth Pty Ltd, Corporate Authorised Representative No. 1277462. Authorised Representative No. 1261222.

## Qualifications

Katrina holds a Bachelor of Commerce and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Katrina is a member of the Institute of Chartered Accountants and the SMSF Association as a Specialist Superannuation Advisor and abides by their code of professional conduct and ethics.

## Authorisations

Katrina 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;
  - basic deposit products.



**Katrina Johnson**  
**Greensborough Office**

First Floor, 65 Main Street  
Greensborough VIC 3088

PO Box 12

Greensborough VIC 3088

Phone: 03 9435 4066

Mobile: 0419 504 244

25 Wellington Street

Collingwood VIC 3066

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## PMP Wealth Advice Fees and Charges

Katrina will be paid 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.

Katrina'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.

PMP Wealth pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Katrina Johnson is a 7.5% shareholder of PMP Wealth and will receive dividends from this company.

## Other Benefits Katrina May Receive

From time to time Katrina 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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Level 1, 607 Bourke Street  
Melbourne Victoria 3000  
1300 306 900  
[www.capstonefp.com.au](http://www.capstonefp.com.au)

This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.