

Financial Adviser Profile



Overview

Paul has been a Chartered Accountant for more than 40 years and has extensive experience in superannuation, taxation and business services. Paul joined Benjamin King Money in 1977, becoming a partner in 1984 and was appointed as CEO in 1999, and completed 36 years of service in 2013. In July 2013, Paul commenced as a Director of Paul Money Partners and continues in that role today. He is very proficient in the area of Self Managed Superannuation Funds.

Paul Money is a Sub-Authorised Representative of PMP Wealth, Corporate Authorised Representative Number 1277462. Authorised Representative Number 293720.

Qualifications

Paul holds a Bachelor of Commerce (Melbourne) and is a registered company auditor. He meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Paul is a member of the Institute of Chartered Accountants, a chartered tax adviser with the Taxation Institute of Australia and an associate of the Superannuation Professionals Association of Australia (SPAA) and abides by their code of professional conduct and ethics.

Authorisations

Paul 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;
 - securities;
 - simple managed investment schemes;
 - life risk insurance products;
 - basic deposit products.



Paul Money

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PMP Wealth Advice Fees and Charges

Paul 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.

Paul'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.

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. Paul is a Director of PMP Wealth and may receive a salary/benefit from this company.

Other Benefits Paul May Receive

From time to time Paul 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.