

Financial Adviser Profile



Overview

Jason is considered a holistic-approach Financial Planner. His motivation is to assist the majority of Australians to improve their wealth potential and adequately protect themselves and their family against insurable risks.

Jason has decades of financial industry experience with certifications including: Advanced Diploma of Financial Planning; Diploma of Financial Services (Finance & Mortgage Broking Management).

Jason has a wealth of experience, with an engaging nature which makes it easy for you to relate and understand the strategies he recommends for your particular circumstances.

Midas Financial Planning aims to provide a quality professional service, delivering information and solutions to clients in a readily understandable format. We pride ourselves on our attention to detail, our level of understanding and compassion, always committed to assisting our clients to reach their financial goals.

Jason Flavel is a Sub-Authorised Representative of Veyra FS Pty Ltd (T/A Midas Financial Planning) Corporate Authorised Representative No. 1321984. Authorised Representative No. 405953.

Qualifications

Jason Flavel holds an Advanced Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Jason Flavel is an Associate Member of the Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

Authorisations

Jason Flavel 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
- Securities
- Standard Margin Lending Facility.



Jason Flavel

Midas Financial Planning

1 James Street
Mount Gambier SA 5290

Phone: 08 8723 9911
Mobile: 0409 508 695

jason@midasfp.com.au
www.midasfp.com.au

Financial Adviser Profile



Midas Financial Planning Advice Fees and Charges

Jason Flavel will be paid Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Jason's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$2,200 and \$22,000 incl. GST.

Jason provides the option of ongoing reporting and advisory services. This fee is either a minimum of \$2,640 p.a. or 1.1% p.a. of the value of your holding incl. GST. The fee will vary depending on the complexity of the service to be provided. For example, if the percentage-based fee is 1.1% p.a. and you invest \$300,000, your ongoing advice fee will be \$3,300 incl. GST.

Veyra FS Pty Ltd (T/A Midas Financial Planning) pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Jason Flavel is a Director of Veyra FS Pty Ltd (T/A Midas Financial Planning) and will receive a salary/benefit from this company.

Other Benefits Jason May Receive

From time to time Jason 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.

Version 4.6



Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
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.