Financial Adviser Profile

Overview

Steve has been providing clients with trusted, strategic financial advice for over 20 years. He has a holistic approach, formulating realistic goals with his clients and facilitating implementation of sound strategies to achieve those goals.

Clients who work with Steve are comfortable along every step of the journey due to his patient and understanding manner. Strategies are clearly explained, giving clients peace of mind that they are on the right track to meet their objectives.

Steve has worked with people from all walks of life including those who are:

- Career successful and looking to optimise future opportunities;
- Starting to focus on their retirement goals;
- Retired and looking for financial security;
- Needing help with moving a loved one into aged care.

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Qualifications

Steve holds a Bachelor of Science from Monash University, has completed a Diploma of Financial Planning, is a Certified Financial Planner and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Steve is a member of the Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Steve 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; and
- Securities.

Stephen Simioni

Abacus Wealth Management
Level 3, 2 Brandon Park Drive
Wheelers Hill VIC 3150

Ph: 9566 7244
M: 0480 277 222
E: steve@abacuswm.com.au
W: abacuswm.com.au

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Abacus Wealth Management Advice Fees and Charges

Stephen Simioni 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 before work is commenced.

Stephen'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.

Stephen 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.

Abacus Wealth Management pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Stephen is a Director of Abacus Wealth Management and will receive a salary from this company.

Other Benefits Stephen May Receive

From time to time Stephen 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.

Level 14, 461 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au