



PLUTUS
FINANCIAL PLANNING

Financial Adviser Profile

Overview

Plutus Financial Planning offer a comprehensive and progressive financial advisory service assisting clients throughout Australia to meet all of their short-, medium- and longer-term financial goals.

Marni Simpson is a Sub-Authorised Representative of Plutus Financial Planning Pty Ltd, Corporate Authorised Representative No. 1297661. Authorised Representative No. 323960.

Qualifications

Marni Simpson holds a Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Marni Simpson 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;
- Securities;
- Superannuation;
- Self Managed Superannuation Funds;



Marni Simpson

Plutus Financial Planning

Level 1 60-1140 Nepean Highway
Mornington, Victoria 3931

5/31 Keysborough Close,
Keysborough, Victoria 3173

Postal: PO Box 336
Mount Martha Vic 3934

Mobile: 0425 762 040

m.simpson@plutusfp.com.au
www.plutusfp.com.au



P L U T U S
FINANCIAL PLANNING

Financial Adviser Profile

Plutus Financial Planning Advice Fees and Charges

Marni Simpson 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.

Marni Simpson's hourly rate for Financial Services is \$275 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Marni Simpson'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.

Marni Simpson's provides ongoing annual advice. You will be notified of the time involved prior to the commencement of any ongoing advice arrangements.

Plutus 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. Marni Simpson is a Director of Plutus Financial Planning and will receive a salary/benefit from this company.

Other Benefits Marni Simpson May Receive

From time to time Marni Simpson 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 4.1



Level 14, 461 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.