Financial Adviser Profile

Overview

John Weall Snr has over four decades of financial planning experience helping clients achieve their financial goals and was previously the Principal of Weall Financial.

John Weall Snr is a Sub-Authorised Representative of Weall Corporation Pty Ltd (T/A Weall Financial), Corporate Authorised Representative No. 1316012. Authorised Representative No. 263541.

Qualifications

John Weall Snr holds Diploma of Financial Planning and SMSF accreditation; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

John Weall Snr is certified financial strategist and member of the Association of Independently Owned Financial Professionals (AIOFP); and abides by their code of professional conduct and ethics.

Authorisations

John Weall Snr is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and 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
- Securities
- Standard Margin Lending Facility.

John Weall Snr

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Weall Financial Advice Fees and Charges

John Weall Snr 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.

John'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 base line SoA fee is $3,300 incl. GST.

John provides the option of ongoing reporting and advisory services via a fixed term agreement. The typical fixed term agreement fee for a 12 month period is 0.66% of the value of your holdings (incl. GST), with a minimum of $4,400 incl. GST and a maximum of $6,600 incl. GST, with a discount available for couples. You will be notified of the cost involved prior to the commencement of any ongoing services.

Weall Financial pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. John is a salaried employee of Weall Financial and will receive a salary/benefit from this company.

Other Benefits John May Receive

From time to time John 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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