

Financial Adviser Profile



Overview

John Weall Jnr is now the Principal of Weall Financial having first joined the team in September 2004.

John graduated from Curtin University completing a Bachelor of Commerce majoring in Financial Planning, he is a Certified Financial Planner® (CFP)® member of the Financial Planning Association of Australia (FPA). Offering a down to earth approach to financial planning.

John Weall Jnr is a Sub-Authorised Representative of Weall Corporation Pty Ltd (T/A Weall Financial), Corporate Authorised Representative No. 1316012. Authorised Representative No. 457024.

Qualifications

John holds a Bachelor of Commerce (Financial Planning) and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

John is a Certified Financial Planner® (CFP)® member of the Financial Planning Association of Australia (FPA) and abides by their code of professional conduct and ethics.

Authorisations

John Weall Jnr 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
- Securities

Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.



John Weall Jnr

Weall Financial

127 Cambridge Street
West Leederville WA 6007

PO Box 1118
West Leederville WA 6901

08 9381 5188

jw@weallfinancial.com.au
www.weallfinancial.com.au

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Weall Financial Advice Fees and Charges

John Weall Jnr 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 \$3,300 incl. GST.

John provides the option of ongoing advisory services. The fixed term agreement 12 month fee of 0.66% of the value of your holdings (incl. GST), with a floor of \$4,400 and a ceiling of \$6,600, 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 Director 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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Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

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This Adviser Profile forms part of the Financial Services
Guide (FSG) and is to be read in conjunction with the FSG.