

# Financial Adviser Profile

## Overview

Having worked across banking, investment and financial planning over the past 32 years, Alex has a wide range of experience working in both domestic and overseas investment markets.

From the outset, identifying the precise expectations and needs of clients has been the defining characteristic of Alex's contribution to providing quality strategic advice and service. Adherence to this philosophy has been the driving factor behind Alex's success.

Creating Finvisory has been Alex's dream since he first realised his talent with numbers. Alex's dedication to ethics and exceptional service have been defining characteristics of the work he has done with clients to achieve exceptional outcomes. Setting ever higher standards in quality advice and customer satisfaction is what Alex thrives on.

Alex has developed a thorough working knowledge of Superannuation law, Retirement Planning, Taxation, Redundancy, Social Security and Aged Care laws. Alex's strengths lie in his understanding of investment markets, retirement issues, estate planning and how taxation and social security fits in the context of these complex areas.

Alex sees financial planning as more than just the management of money. What he really manages are your aspirations, financial goals, security and peace of mind.

Alex Kiss is a Sub-Authorised Representative of Finvisory Pty Ltd, Corporate Authorised Representative No. 1280919. Authorised Representative No. 1003801.

## Qualifications

Alex Kiss holds a Bachelor of Commerce Degree and a Graduate Diploma in Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Alex Kiss is a member of the Financial Planners Association (FPA) and abides by their code of professional conduct and ethics.



**Alex Kiss**

**Finvisory**

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## Authorisations

Alex Kiss 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;

## Finvisory Advice Fees and Charges

Alex Kiss 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.

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.

Alex Kiss 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.

Finvisory pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Alex Kiss is a salaried employee of FINVISORY and will receive a benefit from this company.

## Other Benefits Alex May Receive

From time to time Alex Kiss 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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