

Financial Adviser Profile

Overview

Mark has been involved in the Financial Services industry since 2000 and acted as an Authorised Representative since 2002 when he started his own Financial Planning Business. Mark enjoys working with a variety of clients and uncovering how he can assist in maximising their financial position. Areas of expertise include risk insurance and retirement planning (superannuation, SMSF's, estate planning) all of which are devised with tax effective strategies in mind.

Prior to entering this industry, Mark worked as a Police officer for 22 years and completed his service as a Detective within the ethical standards Department, where he investigated allegations of malfeasance and corruption with the Police Force.

Mark is a Sub-Authorised Representative of Vision Financial Pty Ltd, Corporate Authorised Representative No. 433995. Authorised Representative No. 403358.

Special Interests

Mark is an active community member, having been involved with various football coaching positions over the past 10 years and is a member of the MADCOW (Monbulk & District Community Opportunities Workgroup). Mark also enjoys most sport, but more as a spectator than a competitor these days. He does the occasional bike ride on the Warby and seaside bike trails.

Qualifications

Mark holds a Diploma of Financial Services (Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Mark is a member of the Mortgage & Financial Association of Australia (MFAA) and abides by their code of professional conduct and ethics.

Authorisations

Mark 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; and
- Superannuation.



Mark Seamer

Vision Financial

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Vision Financial Advice Fees and Charges

Mark may be paid by either Financial Planning Advice Fees and/or Commissions 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.

Vision Financials hourly rate for the preparation of a Statement of Advice is \$275 incl. GST with the below guide:

Discovery and Strategy \$1,650 incl. GST

SOA and Implementation of Recommendations \$550 incl. GST (minimum) - \$16,500 incl. GST (maximum)

Annual ongoing Review Fee \$3,300 incl. GST (minimum) - \$16,500 incl. GST (maximum)

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

Other Benefits Mark May Receive

From time to time Mark 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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