Australian Capital Financial Planning ABN 34 122 486 935
Australian Financial Services Licence 380552
5 Noel Street
Slacks Creek, QLD 4127

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Financial Services Guide – Part 2
Adviser Profile

Prepared October 2017

This Adviser Profile should be read together with Part 1 of the Australian Capital Financial Planning Pty Ltd Financial Services Guide.
The Adviser Profile sets out the details of the Representative, the services and products they may provide and details of the remuneration Australian Capital Financial Planning Pty Ltd ("ACFP") AFSL 380552 and the Representative may receive.

Authorised Representative

Jodie Nolan
Authorised Representative No: 001258785

Associated with Corporate Authorised Representative The Trustee for PJN Family Trust trading as "Equis Group Wealth Management" Authorised Representative No. 001258786

Jodie is a financial planner and has been appointed by ACFP as an Authorised Representative.

Contact Details

Postal: PO Box 554 Maleny QLD 4552
Phone: 07 5494 4082
Mobile: 0409 065 712
Email: jodie@equisgroup.com.au
Website: www.equisgroup.com.au and www.jodienolan.com

Professional Qualifications

Master of Business (Applied Finance)
Graduate Certificate of Business (Applied Finance)
Advanced Diploma of Financial Services (Financial Planning)
Diploma of Financial Services (Financial Planning)

Associations & Directorship

Director of Equis Group Wealth Management

Authorisations

Jodie is authorised by ACFP to provide personal advice, general advice and deal in the following products:

Deposit and Payment Products limited to:
a. Basic deposit products

Government Debentures, Stocks and Bonds
Life products including:
a. Life risk insurance

Managed Investment Schemes (including IDPS)
Securities
Superannuation
Self Managed Superannuation Funds
Standard Margin Lending

Our Process

In order to determine the services you require, and to prepare our recommendations, we will walk you through a three step appointment process.

1. Initial Meeting
Determine your financial situation, assess your goals and determine what you would like to achieve. If we determine we are unable to assist you there is no charge or obligation.

2. Presentation of Recommendations
Present our recommendations, discuss the strategy, provide education for any complex concepts, and provide a Statement of Advice detailing our recommendation in writing for your consideration.

3. Review
Having had the opportunity to review and consider the recommendation we will discuss with you any questions, alterations, or clarification you may require.

Fees & Charges

ACFP may receive a fee for service or an upfront and ongoing commission if you decide to proceed with Jodie's recommendations. The following outlines how the fees and commissions will be calculated.

Statement of Advice Preparation Fee
A fee of $650 is payable for the preparation of Statement of Advice.

Implementation Fee
Up to $7,500 subject to complexity in recommendation.

Entry Fee & Ongoing Fee
Entry fee ranging from 0% - 2.2% of amount invested.
Ongoing fee ranging from 0% up to a maximum of 5% of total funds invested paid in advance. Eg $100,000 x 5% = $5,000

Commission
Upfront Commission (payable by the insurance product provider)
Deducted from the premium paid when you purchase the product.

Insurance products, calculated on the premium paid: between 0% and 135% (plus GST)

Ongoing Commission
Deducted regularly from your insurance premium paid.

Insurance products, calculated on the renewal premium paid: between 0% and 33% (plus GST)

All fees and charges will be explained to you and detailed within your Statement of Advice.

Remuneration

ACFP pays Equis Group Wealth Management 80% of all fees initial or ongoing commissions as a result of recommendations to you.

Benefits

Jodie may receive other benefits including attendance at professional development programs, conferences and other incentives such as allowances and other related entertainment benefits.