

Financial Adviser Profile



Overview

Geoff Sharpe has worked in finance for over 20 years, both in Brisbane and overseas, and has been providing financial advice since 1999. He gained a wealth of pertinent experience during his years as an Adviser with the renowned Whittaker Macnaught Group and has been providing personalised financial advice as the Director of Sharpe Financial Solutions since 2013.

Geoff has always had an aptitude for numbers and an interest in finance. He understands the important role that both of these things play in helping clients achieve their dreams through the value of having a financial plan. Geoff gets great enjoyment from helping people achieve their goals by improving their financial position.

Geoff is a Sub-Authorised Representative of Sharpe Financial Solutions Pty Ltd, Corporate Authorised Representative No. 440815. Authorised Representative No. 440874.

Qualifications

Geoff is a Certified Financial Planner™ and also holds a Diploma of Financial Planning as well as a Bachelor of Business (Finance). He meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Geoff is a member of the Financial Planning Association of Australia (FPA) and abides by their code of professional conduct and ethics.

As an approved FPA Professional Practice, Sharpe Financial Solutions Pty Ltd comply with the highest ethical and professional standards set by the Financial Planning Association of Australia (FPA).

Authorisations

Geoff Sharpe 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;
- Securities; and
- Standard Margin Lending Facility.



Geoff Sharpe

Sharpe Financial Solutions

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Sharpe Financial Solutions Advice Fees and Charges

Geoff Sharpe 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.

You may be charged a fee of \$375 (incl. GST) for your initial consultation with Geoff.

Geoff's 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.

Geoff's hourly rate for Financial Services is \$375 (incl. GST) and you will be notified of the time involved prior to the commencement of any work if applicable.

Geoff provides the option of ongoing advisory services. This fee is either a fixed fee p.a. (incl. GST) or a percentage (%) p.a. of the value of your holdings (incl. GST). You will be notified of the cost involved prior to the commencement of any ongoing services.

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

Other Benefits Geoff May Receive

From time to time Geoff 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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