

Financial Adviser Profile

Overview

Jannette comes to us with a wealth of experience as a Senior Financial Planner providing financial advice for over 16 years. She loves working with clients and has a friendly and knowledgeable approach. She is a good listener and works with clients to ensure their financial goals are achieved. Jannette particularly enjoys working with pre and post retiree clients to ensure their retirement planning is well managed, and will meet their needs over the long term.

Jannette has an Advanced Diploma in Financial Planning and is also a Self-Managed Superannuation Fund specialist.

Jannette has also completed the FASEA exam in which her ethical approach ensured her success.

She believes in a continual improvement approach for herself and her client portfolios. Jannette enjoys the technical side of her role and applying this skill to her clients' portfolios.

When not working with clients Jannette enjoys reading, gardening, and her three Alpacas, Daisy, Dotty and Dolly. She is community minded and participates in various local group activities.

Jannette is a Sub-Authorised Representative of Everalls Wealth Management Pty Ltd, Corporate Authorised Representative No. 465367. Authorised Representative No. 278001.

Qualifications

Jannette holds the following qualifications, and meets the competency requirements under ASIC's Regulatory Guide RG 146:

- Advanced Diploma in Financial Services
- Associate Membership of the Financial Planning Association
- SMSF Specialist
- Margin Lending

Professional Memberships

Jannette is an Associate member of the Financial Planning Association of Australia, and the Tax Practitioners Board, and abides by their code of professional conduct and ethics.



Jannette Moseley

Advanced Diploma Financial
Services (FP)

Everalls Wealth Management

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Authorisations

Jannette is authorised to provide advice and deal in the following financial products:

- Self-Managed Superannuation Funds;
- Superannuation;
- Retirement Savings Accounts (“RSA”) products;
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services;
- Deposit & Payment Products;
- Life Products including Investment Life Insurance Products & Life Risk Insurance Products;
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government;
- Securities; and
- Standard Margin Lending Facility.

Everalls Wealth Management Advice Fees and Charges

Jannette may 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.

The fees that Everalls Wealth Management charge for the preparation of initial advice and any ongoing advisory services will be charged on a fee for service basis (not commission based), with an hourly rate of \$350 incl GST. You will be notified of the time involved prior to the commencement of any work if applicable.

Where financial planning fees are payable., Capstone Financial Planning will receive all revenue in the first instance.

Everalls Wealth Management Pty Ltd pays a fixed licencing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you.

Jannette is appointed as an Authorised Representative under Everalls Wealth Management Pty Ltd. Capstone Financial Planning has no association with DFK Everalls Pty Ltd.

Other Benefits Jannette May Receive

From time-to-time Jannette 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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