

Financial Adviser Profile

Overview

When it comes to building wealth, Bob doesn't just offer financial advice - he delivers strategies designed to get results. With years of experience helping professionals and high income families achieve their financial goals, Bob specialises in creating holistic, goal driven wealth plans tailored to every client's unique needs. His approach is clear and conflict free, with strategies built on transparency, thorough analysis, and a deep understanding of each client's financial aspiration.

As a Certified Financial Planner (CFP®) - an internationally recognised mark of excellence - Bob brings top tier expertise to every interaction. His other qualifications include a business degree from the University of Technology Sydney, advanced studies in investment and portfolio theory at University of New South Wales, two additional finance-related diplomas, and multiple specialist accreditations. This depth of knowledge means clients don't just get advice - they get strategies backed by research, insight and proven financial principles.

When he's not working with clients or enjoying quality time with his family, Bob is an avid tennis player, an advanced free diver, and a passionate advocate for sustainable living. Bob has a deep appreciation for fine food, often cooking meals with fresh ingredients from his organic garden and catch from the pristine waters of the south coast.

Committed to giving back, Bob also serves as a Justice of the Peace in the ACT, is an active member of the local business community, and supports global initiatives through impact investing with Empower Malawi.

Bob is a Sub-Authorised Representative of Everalls Wealth Management Pty Ltd, Corporate Authorised Representative No. 465367. Authorised Representative No. 413819.

Qualifications

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

- Bachelor of Business
- Cavendish & ICFS Specialist SMSF Course
- Investments and Portfolio Selection - Subject only, Master of Financial Planning
- Diploma of Share Trading and Investment
- Diploma of Financial Services
- DPML Margin Lending
- Cert IV in Finance and Mortgage Broking



Shi (Bob) Chen

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Professional Memberships

Bob is a member of the Financial Advice Association Australia (FAAA), a Certified Financial Planner CFP® and the Tax Practitioners Board and abides by their codes of professional conduct and ethics.

Authorisations

Bob Chen 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
- Securities
- Standard Margin Lending Facility.

Everalls Wealth Management Advice Fees and Charges

Bob 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 before work is commenced.

The fees that Everalls Wealth Management charges for the preparation of initial advice and any ongoing advisory services will be charged on a fee for services basis (not commission based), with an hourly rate of \$450 + GST. You will be notified of the time involved prior to the commencement of any work if applicable.

Where financial planning advice 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.

Bob is a salaried employee of Everalls Wealth Management Pty Ltd and will receive a salary/benefit of this company.

Other Benefits Adviser May Receive

From time to time Bob 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.