Financial Adviser Profile

Overview

Thomas Weir has over 30 years of experience in the provision of financial and accounting advice and is a Sub-Authorised Representative of B&W Additions Pty Ltd, Corporate Authorised Representative No. 447227. Authorised Representative No. 267298.

Qualifications

Thomas holds a Master's of Taxation, Bachelor of Commerce, and has completed unit 1 with the Securities Institute and units 2-6 with the Financial Planning Association of a Diploma of Financial Planning. He also holds specialist accreditations in Self Managed Superannuation Funds and Margin Lending and Geared Investments; and as such meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Thomas is a member of the Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

Authorisations

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

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and 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.

Thomas Weir

B&W Additions

Level 11, 50 Market Street
Melbourne VIC 3000

PO Box 200 Collins Street
West VIC 8007

(03) 9629 1433

tweir@bwadditions.com.au
www.bwadditions.com.au

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B&W Additions Advice Fees and Charges

Thomas 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.

Thomas' 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.

Thomas' hourly rate for Financial Services is $440.00 incl. GST.

For supplementary services, such as the provision of general research or administrative tasks, the hourly rate is $165.00 incl. GST.

Thomas provides the option of ongoing reporting and advisory services which range from $550.00 incl. GST to $20,000 incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

For assistance on an execution only basis, i.e. where you have been offered and decline advice, a fee of up to $150.00 incl. GST per transaction or $440.00 incl. GST per hour will be charged.

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

Other Benefits Thomas May Receive

From time to time Thomas 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.

Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au