

Financial Adviser Profile

Overview

Lachlan Weir has 4 years of experience in the provision of financial advice starting as a Paraplanner and is a Sub-Authorised Representative of B&W Additions Pty Ltd, Corporate Authorised Representative No. 447227. Authorised Representative No. 1307275.

Qualifications

Lachlan holds a Graduate Diploma of Financial Planning, Bachelor of Business, and an accreditation in Self Managed Superannuation Funds. He has also completed an Accredited Listed Product Adviser Program; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Authorisations

Lachlan Weir is authorised as a Provisional Adviser and is able to provide advice and deal (under the supervision of a senior Capstone Financial Adviser) 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.

Lachlan is currently undertaking a Professional Year of work and training in accordance with subsection 921B(4) of the Corporations Act 2001. Their Supervisor during this period is Thomas Weir (Authorised Representative No. 267298) of B&W Additions Pty Ltd.

Thomas Weir will be responsible for any advice provided by Lachlan Weir during that time.

Lachlan is authorised to provide financial advice, conduct client meetings and prepare advice documents only under the supervision of a senior Capstone Financial Adviser.



Lachlan Weir

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B&W Additions Advice Fees and Charges

Lachlan 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.

Lachlan'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.

Lachlan's 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.

Lachlan 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. Lachlan is a salaried employee of B&W Additions and will receive a salary/benefit from this company.

Other Benefits Lachlan May Receive

From time to time Lachlan 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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