

# Adviser Profile

## Mark Robinson

CFP®, Adv Dip FS (FP), MBA, B Sc Econ (Hons)



This adviser profile forms an essential part of the Financial Service Guide (FSG). The FSG is not complete without it.

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| <b>Authorised Representative Number:</b>           | 304081    |
| <b>Corporate Authorised Representative Number:</b> | 376837    |
| <b>Adviser profile issue date:</b>                 | 20/9/2018 |
| <b>Version:</b>                                    | 5.1       |

Mark Robinson is an Authorised Representative of RI Advice Group Pty Ltd (RI Advice Group) ABN 23 001 774 125, AFSL 238429. Mark Robinson is employed by Finsura Insurance Management Services Pty Ltd which is a Corporate Authorised Representative of RI Advice Group.

### Qualifications and experience

I commenced working in the financial services industry in 1992, and began my current role in 2006. In addition to assisting clients, I commit considerable time to the training and coaching of financial planners and continue to work actively with the education arm of the Financial Planning Association of Australia (FPA).

I hold the internationally recognised Certified Financial Planner™ or CFP® qualification from the Financial Planning Association of Australia and an Advanced Diploma of Financial Services (Financial Planning). I also have a Masters of Business Administration (MBA) and an Honours Degree in Economics. With these qualifications and my extensive experience, I am well qualified to help clients to achieve their financial goals.

### Services offered

I am authorised to provide advice in the following areas:

- Superannuation
- Retirement planning
- Investments, including savings plans
- Approved ASX listed investments within the ASX 200
- Personal insurance
- Budget and cash flow planning
- Debt management
- Gearing
- Centrelink / DVA
- Aged care
- Ownership and structures (e.g. discretionary and family trusts)
- Self-managed superannuation
- Portfolio review
- Estate planning
- Ongoing advisory services
- Referrals to specialists (eg accountants, solicitors)

## Products offered

I am authorised to deal in the following products:

- Deposit and payment products
- Derivatives
- Life investment or life risk products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Securities
- Superannuation
- Standard margin lending facilities

## How I am paid

As the licensee, RI Advice Group collects all advice fees and commissions. RI Advice Group then pays the fees and commissions to my Practice as detailed in the Guide under 'How We are Paid'. My Practice pays me out of the fees and commissions it receives from RI Advice Group, by one or more of the methods outlined below.

- **Salary** – I may be paid a salary based on my experience and capability.
- **Bonus** – I may be eligible to receive a bonus, based on a combination of revenue and certain non-financial measures (such as the quality of my service).

At the time of providing advice, we will disclose the amounts that RI Advice Group, the Practice and I receive (if any) as a result of that advice.

## Client fee and payment options

Before providing advice, we will agree the fees and payment options with you. The fee you pay will depend on the complexity of your circumstances and the services you require.

Our fees are charged as fee for service.

**Fee for service:** Fee for service is based on the service we provide. This fee can be determined by:

- An hourly rate.
- A fixed dollar amount.
- A percentage of funds invested (excluding borrowed funds).
- A combination of these methods.

We can invoice you directly for our fee for service. Alternatively, some products allow an adviser service fee to be deducted from the investment balance.

**Commissions:** I do not receive commissions.

## Additional privacy disclosure – our business partners

In order to keep our costs competitive, our practice uses specialist business support resources that are located in the following country/countries: Sri Lanka

The organisation/s we have contracted to support our business have confirmed to us they will adhere to the Australian Privacy Principles when dealing with your personal information. They will not contact you or share your information with any other party unless they have your express approval.

## My contact details

|         |   |
|---------|---|
| Address | Suite 10 Level 1, 32 Florence Street HORNSBY NSW 2077 Australia |
| Phone   | (02) 9477 3340  |