

## Shaun Jones

This adviser profile is a summary about me and should be read in conjunction with my Licensee's Financial Services Guide and Privacy Statement. My profile sets out my contact details, professional details, the services, and products I provide and how I am paid.



### My story and expertise

Having worked in the superannuation and financial planning industry since 2005, I have been fortunate to help many Australians with their financial decisions. I have a passion for the coaching side of sports, which is transferable to the approach I take in financial planning. My purpose is to assist clients in identifying their financial goals, navigating the different paths available, and choosing the best options going forward.

I have gained valuable experience from my time at financial institutions such as Aware Super, NAB, Telstra Super, and KPMG. I have provided financial advice for over nine years and have developed a deep understanding of the challenges and opportunities faced by Australians in the years leading up to and during retirement.

My recent experience has focused on compliance and ensuring that quality advice is provided by financial planning providers. The rules around superannuation, tax, and Age Pension entitlements are constantly changing, and I believe there is always an opportunity to educate clients and adapt positively to these changes. My areas of technical expertise include superannuation wealth management, social security support, and retirement income strategies.

I genuinely enjoy working with clients and supporting them in making a meaningful difference in their lives.

### Area of Specialisation

- Superannuation and Retirement Planning
- Centrelink and Age Pension benefits
- Estate Planning
- Socially and Ethically responsible investments
- Wealth Preservation strategies
- Tax Effective Investments and Wealth Creation

### My qualifications

- Master of Applied Finance (Financial Planning)
- Graduate Diploma of Financial Planning
- Advanced Diploma of Financial Services (Financial Planning)
- Margin Lending and Geared Investments
- Qualified tax relevant provider

### Personal Interests

As a husband and father of three young children, I lead a busy life outside of work, especially on weekends filled with basketball, cricket, and footy for both my kids and myself. In my spare time, I enjoy being outdoors - gardening, exploring the Dandenong Ranges and surrounding areas, and catching up with family and friends.

### Products I can offer

I am authorised to provide personal and/or general advice on and deal in the following financial products:

- Basic and non-basic deposit products
- Government debentures, stocks and bonds
- Life insurance (risk and investment)
- Managed investments including Investor Directed Portfolio Services (IDPS)
- Retirement Savings Accounts
- Securities
- ETFs
- Superannuation (including some Industry Super Funds that are open to working with advisers)
- Margin lending

## How you are charged for service

The cost of providing a financial product or service to you will depend on the nature and complexity of the advice, financial product and/or service provided. Generally, whenever I provide a recommendation for a financial product or service, I will be remunerated through either:

- An initial fee for service
- An ongoing fee for service
- A combination of any of the above.

**Prior to preparing any advice or providing financial services to you, we will discuss and agree upon all fees that will apply.**

<b>My service fees (GST inclusive)</b>	
Hourly rate (or part thereof) for ad hoc advice	\$385
Fee for preparation of Statement of Advice	from \$2,200 up to \$13,200
Ongoing service fee (Fixed fee based on service package)	from \$220 pm
Centrelink application	from \$660

## How I get paid

I receive a salary from About Retirement and may also receive a management fee or distribution of profits from About Retirement and/or Asire. The amount of my salary is dependent on a range of factors including my experience, skills and professional standards.

The exact amounts of any fees received by Asire and me will be disclosed in your SOA or ROA. Fees are paid to Asire in the first instance who then pay your adviser/s.

## Independent Financial Planning & Retirement Planning Advice

## Referral Arrangement

About Retirement and I have referral arrangements in place with a range of specialist businesses as this allows me to refer you to other professionals in areas that I do not practice in and vice versa.

Neither party is receiving or paying any commission or referral fee. This service exists only for the benefit of our clients.

Neither I, Asire nor About Retirement have any association or relationship with the issuers of financial products or third-party service providers that might reasonably be expected to be capable of influencing them in the provision of financial services to you.

**We are not related to any other parties that you may deal with in the course of receiving advice from us.**

## Questions?

Please ask me to explain anything you do not understand in my adviser profile or FSG.

## Shaun Jones

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Your adviser is authorised representatives of ASIRE Financial Services Pty Ltd AFSL No 533661.

**Please read this Adviser Profile in conjunction with ASIRE FSG, Privacy Policy and Public Complaints Policy documents.**