



Financial Adviser Profile

Overview

Helen has been involved in financial planning since 1986 and has assisted clients, first hand, through the many changes that have occurred over the years, all of which have helped to shape the industry as we know it today. Through her longstanding career, Helen has earned an enviable reputation for providing quality advice and exceptional ongoing service to her valued clients and, many would say, is “the person to see if you’re planning to retire”.

Whilst Helen provides a fully comprehensive advice service, she is highly regarded in the following areas:

- Retirement Planning and Centrelink Strategies
- Personal Superannuation, including Defined Benefit Plans
- Wealth Accumulation Strategies
- Salary Sacrifice
- Cash Flow and Savings Plans

Helen strongly believes in the importance of ‘getting your ducks in a row’ by seeking financial advice early. She believes that, not only will timely advice give you peace of mind and confidence, but it will also help to establish solid strategies that should serve you well into the future.

Above all else, Helen values relationships built on trust and mutual respect.

Helen is a Sub-Authorised Representative of Strategic Retirement Solutions Pty Ltd, Corporate Authorised Representative No. 1248926. Authorised Representative No. 1239397.

Qualifications

Helen is a CERTIFIED FINANCIAL PLANNER®, holds a Diploma of Financial Planning (Dip FP) and meets the competency requirements under ASIC’s Regulatory Guide RG 146. Helen is also a Commissioner of Declarations (Cdec).

Professional Memberships

Helen is a member of the Financial Planning Association and abides by their code of professional conduct and ethics.



Helen Stevenson

Strategic Retirement Solutions

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Authorisations

Helen 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;
- Securities; and
- Standard Margin Lending Facility.

Strategic Retirement Solutions Advice Fees and Charges

Helen 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.

Helen’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.

Helen provides the option of ongoing reporting and advisory services. This fee is 0.75% pa of the value of the funds under advice (incl. GST), with a minimum fee of \$3,500 pa. You will be notified of the cost involved prior to the commencement of any ongoing services.

Strategic Retirement Solutions Pty Ltd pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Helen is a Director of Strategic Retirement Solutions Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Helen May Receive

From time to time Helen 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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