

# Financial Adviser Profile

## Overview

With over 18 years' experience within the financial services industry, Chelsea provides her clients with specialised advice around Aged Care and Centrelink. Through her experience and passion to help others navigate this area, Chelsea finds purpose in delivering a consistent comprehensive service and support to her clients. Given the often emotional time around making these decisions, Chelsea prides herself in ensuring her clients understand the process and have clarity about the best steps forward.

CarePlan Advisory was established with the goal to provide guidance, support, and advice to those who are making important life and financial decisions, often at short notice. While Chelsea is professionally qualified to provide advice in this area, she has developed a true passion for helping others through this process based on her own personal experiences. Chelsea values developing a trusting and transparent relationship with her clients. This means you can concentrate on spending quality time with those that mean most to you, knowing the technical aspect is taken care of by the professionals.

Chelsea Robinson is a Sub-Authorised Representative of CarePlan Advisory Services Pty Ltd, Corporate Authorised Representative No. 1292551. Authorised Representative No. 1006076.

## Qualifications

Chelsea holds the following qualifications and meets the competency requirements under ASIC's Regulatory Guide RG 146.

- Master of Commerce (Financial Planning)
- Graduate Certificate Commerce (Financial Planning)
- Diploma Financial Planning
- Justice of the Peace
- Accredited Aged Care Steps Professional (Aged Care Steps Pty Ltd)

## Professional Memberships

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

## Authorisations

Chelsea Robinson 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.



## Chelsea Robinson

CarePlan Advisory Services

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## CarePlan Advisory Advice Fees and Charges

Chelsea Robinson 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.

Chelsea'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.

Chelsea's provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

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

## Other Benefits Chelsea May Receive

From time-to-time Chelsea Robinson 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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This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.