



Financial Adviser Profile

Overview

Matthew Bellenger has extensive experience in the financial planning industry. He has spent over 10 years in the financial advice industry, including over 7 years as a Financial Adviser offering advice to individual clients as well as small and large business clients.

Matthew Bellenger is a Sub-Authorised Representative of 145 Financial Planning Pty Ltd, Corporate Authorised Representative No. 1254176. Authorised Representative No. 382571.

Qualifications

Matthew Bellenger holds a Diploma of Financial Planning, and an Advanced Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Matthew Bellenger is a member of the Association of Financial Advisers (AFA) and holds the AFA's professional designation – The Fellow Chartered Financial Practitioner (FChFP) and abides by their code of professional conduct and ethics.

Authorisations

Matthew Bellenger 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;
- Superannuation;
- Self-Managed Superannuation Funds; and
- Securities.

Matthew Bellenger

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145 Financial Planning Pty Ltd Advice Fees and Charges

145 Financial Planning Pty Ltd / Matthew Bellenger 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.

145 Financial Planning Pty Ltd / Matthew Bellenger 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.

145 Financial Planning Pty Ltd / Matthew Bellenger provides the option of ongoing reporting and advisory services. This fee ranges from \$2,400 p.a. to \$15,000 p.a. incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

145 Financial Planning 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. Matthew is a Director of 145 Financial Planning Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Matthew Bellenger May Receive

From time to time Matthew 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.