

Financial Adviser Profile

Overview

Daniel is an experienced Financial Adviser having provided valuable advice and support to his clients for over 15 years worldwide and in Australia since 2010.

Daniel highly values long-term relationships with his clients and loves seeing them achieve their financial objectives and goals.

Daniel excels in educating his clients and explaining complex topics and strategies in simple terms. This empowers his clients to be part of a true collaboration where they feel in control, understand the value of his services and are not just passengers.

Daniel Feldman is a Sub-Authorised Representative of Family Financial Solutions Pty Ltd, Corporate Authorised Representative No. 1278733. Authorised Representative No. 1002820.

Qualifications

Daniel Feldman holds an Advanced Diploma of Financial Services (Financial Planning) and meets competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Daniel Feldman is a member of the Association of Financial Advisers (AFA) and abides by their code of professional conduct and ethics.

Authorisations

Daniel 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; and
- Self-Managed Superannuation Funds.



Daniel Feldman

Family Financial Solutions

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Family Financial Solutions Advice Fees and Charges

Daniel Feldman 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.

Daniel'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.

Daniel 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.

Family Financial Solutions pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Daniel Feldman is a salaried employee of Family Financial Solutions and will receive a salary from this company.

Other Benefits Daniel May Receive

From time to time Daniel 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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