Financial Adviser Profile

Overview

Scott is a passionate Financial Advisor, dedicated to providing comprehensive and holistic to advice to his clients. Offering financial advice since 2016 and with close to a decade of experience in the finance industry, Scott is skilled in all areas of advice including wealth protection, wealth creation and retirement planning, in addition to more complex areas of advice such as SMSFs, securities and margin lending.

Scott loves building long-term relationships with his clients, being a part of their financial journey and seeing them achieve their financial goals. He understands the importance of collaboration during the financial advice process and relishes the opportunity to educate his clients, to explain complex strategies in easy to understand, simple terms. Scott's aim is to equip his clients with sound financial understanding, increasing their knowledge of financial matters, and aid them in becoming active participants in their own financial advice journey.

Outside of work Scott can be found enjoying time with his young family, playing cricket and supporting his beloved Bombers.

Scott Foster is a Sub-Authorised Representative of Family Financial Solutions Pty Ltd, Corporate Authorised Representative No. 1278733. Authorised Representative No.1241534.

Qualifications

Scott Foster holds a Graduate Diploma in Financial Services (University of New England) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Scott Foster is a member of the Financial Planners Association (FPA) and abides by their code of professional conduct and ethics.

Authorisations

Scott 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;
- Self Managed Superannuation Funds;
- Securities; and
- Standard Margin Lending Facility.

Scott Foster

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Family Financial Solutions Advice Fees and Charges

Scott Foster 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.

Scott'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.

Scott 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 Scott May Receive

From time to time Scott 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.