

Financial Adviser Profile



Overview

Jabin has over 25 years of experience in stockbroking and wealth management. His core area of investment expertise lies in understanding his clients' needs, business and financial circumstances while customising an asset allocation and investment selection across Australian equities, US, European and Asian Pacific markets.

Protecting your capital while looking for income and growth opportunities is what he loves most. Emphasizing secure, high-quality assets, he advocates for prudent and expert management of your financial investments through a tailored, personalised approach that is designed for your specific circumstances.

He initially cut his teeth at Bell Potter before consolidating this experience at Challenger and more recently Morgans Financial.

Jabin loves to closely collaborate with his clients to craft holistic solutions, leveraging the full suite of Family Financial Solution's resources.

Jabin Hallihan is a Sub-Authorised Representative of Family Financial Solutions Pty Ltd, Corporate Authorised Representative No. 1278733. Authorised Representative No.1234882.

Investment Style

Jabin is known for his unwavering focus on researching all suitable opportunities, asset classes and markets to uncover the best opportunities available and on the investment horizon.

Personalised diversification across asset classes, industries and markets (given the breadth of Australian industry), is as important as meticulous stock selection.

Qualifications

Jabin holds the Securities, Futures Markets & Managed Investments Accreditation Program, SDIA, Foundations of Financial Planning through Kaplan, and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Jabin is a member of the Stockbrokers and Financial Advisers Association (SAFAA) and abides by their code of professional conduct and ethics.

Service and Specialties

Jabin specialises in providing advice on the following areas:

- Fixed Interest & Cash Management
- Wealth Management
- Margin Lending & Gearing Strategies
- Superannuation Advice
- Stockbroking - domestic & global share portfolios



Jabin Hallihan
Senior Financial Adviser

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"Don't treat your portfolio like a time capsule. It takes active monitoring and informed adjustments to get the best from opportunities and achieve your desired results. It's my job to take you on this journey and proactively advise so that your investments match your personal circumstances and the ever-changing financial market conditions and opportunities."

- Jamin Hallihan

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Authorisations

Jabin is authorised to provide advice and deal in the following financial products:

- Financial Planning
- Managed Investments
- Listed Securities (shares and other products)
- Self-Managed Superannuation Funds
- Margin Lending
- Superannuation
- Cash and Term Deposits

Family Financial Solutions Advice Fees and Charges

Jabin Hallihan 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.

Jabin's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the advice provided. You will be notified of the costs involved prior to the commencement of any work.

Jabin 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 FF Solutions Group Pty Ltd and will receive all revenue earned from the financial services provided to you. Jabin is a salaried employee of Family Financial Solutions and will receive a salary and may also receive a percentage of revenue from this practice.

Other Benefits Scott May Receive

From time to time Jabin 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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