

# Financial Adviser Profile

## Overview

Alex Screen has worked in the Financial Advice Profession since 2007, following previous careers in Chemistry, Teaching and Manufacturing. Alex offers Personal Financial Planning advice via his practice, Exact Solutions. Alex draws upon a wide range of qualifications and experiences to be uniquely suited to understand client's current situations and to then apply his deep desire to put his clients into an improved situation which enables them to achieve their financial goals.

Alex provides advice in the areas of:

- Investments and Superannuation
- Transition to Retirement and Retirement Planning
- Business Succession Planning
- Aged Care Advice
- Personal and Business Insurances
- Direct Equities and SMSF advice

Alex Screen is a Sub-Authorised Representative of Exact Solutions Pty Ltd, Corporate Authorised Representative No. 1284780. Authorised Representative No. 469530.

## Qualifications

Alex Screen holds a Bachelor's Degree in Applied Science, Graduate Diploma in Education, Diploma in financial Services (FP) and Advanced Diploma of Financial Services (FP) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Alex Screen is a voting (AFP) member of Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

## Authorisations

Alex Screen 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; and
- Securities.



### Alex Screen

Exact Solutions

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## Exact Solutions Advice Fees and Charges

Alex Screen 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.

Alex'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.

Alex provides the option of ongoing reporting and advisory services. Our Fees are charged as "Fee for Service", based on the service we provide (all fees include GST). This fee can be determined by:

- An hourly rate for Financial Services;
- A fixed dollar amount;
- A percentage of funds invested (excluding borrowed funds); or
- A combination of these methods.

You will be notified of the cost involved prior to the commencement of any ongoing services.

Exact 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. Alex Screen is a Director of Exact Solutions and will receive a salary/benefit from this company.

## Other Benefits Alex Screen May Receive

From time to time Alex 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.