Financial Adviser Profile

Overview

Jonathan is a Certified Financial Planner (CFP®) and a member of the Financial Planning Association. He has over 12 years experience in the financial planning industry and has worked with some of Australia's largest insitiutions as a senior adviser before becoming the Principal adviser at True Wealth Advisers.

Jonathan Mulconry is a Sub-Authorised Representative of True Wealth Advisers Pty Ltd, Corporate Authorised Representative No. 1255994. Authorised Representative No. 1003869.

Qualifications

Jonathan holds a Masters of Applied Finance and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Jonathan is a member of Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Jonathan 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;
- Standard Margin Lending Facility.

Jonathan Mulconry

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True Wealth Advisers Advice Fees and Charges

Jonathan Mulconry 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.

Jonathan'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.

Jonathan provides the option of ongoing reporting and advisory services. This fee is a fixed fee incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

True Wealth Advisers pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Jonathan is a Director of True Wealth Advisers and will receive a salary/benefit from this company.

Other Benefits Jonathan May Receive

From time to time Jonathan 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.