

# Financial Adviser Profile



## Overview

I have been working in the financial services industry since 2019 specialising in pre-retirement and retirement planning, and aged care advice. I have a strong focus on individuals – with the limit on the number of clients I take on, I can spend more time on each of my clients.

Lennon Matthews-Rowell is a Sub-Authorised Representative of LMR and Co Pty Ltd, Corporate Authorised Representative No. 1309808. Authorised Representative No. 1301308.

## Qualifications

Lennon Matthews-Rowell holds a Graduate Diploma of Financial Planning, and completed the Aged Care Specialist Accreditation with Aged Care Steps, and meets the competency requirements under ASICs Regulatory Guide RG 146.

## Authorisations

Lennon Matthews-Rowell is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts (“RSA”) products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation
- Securities

### Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.

## Lennon Matthews-Rowell

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## LMR and Co Pty Ltd Advice Fees and Charges

Lennon Matthews-Rowell 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.

	<b>Upfront</b>	<b>Ongoing</b>
Pre-Retirement and Retirement	\$5,000 - \$10,000	\$5,000 - \$20,000
Aged Care	\$9,000 - \$15,000	N/A

All prices are NOT inclusive of GST.

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

## Other Benefits Lennon May Receive

From time to time Lennon 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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