

Financial Adviser Profile

Overview

Andrew Weaver has been a longstanding member of the Financial Services Industry in Australia particularly in personal finance, wealth management and protection. Since 2007, Andrew has provided professional financial advice to a wide range of clients who mainly reside in the Sutherland Shire and St George areas.

Andrew specialises in providing pre and post retirement planning advice. His expertise is in helping clients manage their superannuation through identifying their retirement goals, income needs, as well as maximising government benefits so they have a comfortable worry-free retirement.

Andrew is an Authorised Representative (No. 469829) of Weaver Wealth Management Pty Ltd, Corporate Authorised Representative No. 469828.

Qualifications

Andrew holds a Master of Applied Finance, a Diploma of Financial Services (Financial Planning) and is also a Justice of the Peace. He meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Andrew is an AFP member of the Financial Planning Association. He is also a Tax (Financial) Adviser member of the Tax Practitioner Board. He abides by the codes of professional conduct and ethics of these associations.

Authorisations

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

- Investment planning
- Superannuation and retirement planning
- Employer superannuation
- Personal and business risk including income protection, total and permanent disability, trauma, life cover, business overheads and group life insurance
- Information on Centrelink benefits
- Managed investment schemes (e.g., managed funds, unit trusts, Separately Managed Accounts, and Investor Directed Portfolio Services)
- Deposit and payment products



Andrew Weaver

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Management Pty Ltd**

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Weaver Wealth Management Advice Fees and Charges

Andrew Weaver 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.

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

Other benefits Andrew Weaver may receive

From time to time Andrew 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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