Financial Adviser Profile

Overview

Bronson Financial Services was founded by Paul and Cheryl Bronson in 2006 with aim of providing you and your family with their own Chief Financial Officer, that is a person working on your financial plans for you.

Paul Bronson is a Sub-Authorised Representative of Bronson Financial Services Pty Ltd, Corporate Authorised Representative (No. 316834) of Capstone Financial Planning Pty Ltd ABN 24 093 733 969 AFSL No:223135. Authorised Representative No. 292203.

Qualifications

Paul Bronson is a Certified Financial Planner (CFP®) and holds a Bachelor of Commerce, a Master of Business Administration and a Diploma of Financial Services (FP) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Paul Bronson is a member of the Financial Planning Association (FPA) and abides by their code of professional conduct and ethics.

Authorisations

Paul Bronson 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;
- Securities; and
- Standard Margin Lending Facility.

Paul Bronson

Bronson Financial Services

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Bronson Financial Services Fees and Charges

Paul Bronson 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.

Paul Bronson's hourly rate for Financial Services is $375 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Paul Bronson'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.

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

Other Benefits Paul May Receive

From time to time Paul Bronson 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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