

Financial Adviser Profile

Overview

Morgan has been involved in the financial services industry since 2015 whilst completing his Bachelor of Commerce. Prior to this he spent 10 years in Business Management specialising in finance and logistics in the FMCG industry.

With these qualifications and experience, he is well qualified to help clients to achieve their financial goals. Morgan is a Sub-Authorised Representative of Lane Financial Planning Pty Ltd, Corporate Authorised Representative No.1264755. Authorised Representative Number. 1246844.

Qualifications

Morgan holds a Bachelor of Commerce (Finance, Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Authorisations

Morgan 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



Morgan Collins

Lane Financial Planning

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Lane Financial Planning Advice Fees and Charges

Morgan Collins 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 or subsequent meetings prior to preparing any Statement of Advice.

Morgan'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.

Morgan provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

Lane Financial Planning pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Morgan is a salaried employee of Lane Financial Planning and will receive a salary/benefit from this company.

Other Benefits Morgan May Receive

From time to time Morgan 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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This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.