

Financial Adviser Profile

Overview

Blair became a Financial Planner in 2006 and joined Frankston Financial Services in April 2021. Having worked in the Financial Planning Profession for over 20 years through a variety of roles Blair brings a vast amount of experience to our Business.

Blair specialises in Retirement Planning, Superannuation Planning, Investment Planning and Personal Insurance Advice.

Blair Classon is a Sub-Authorised Representative of Frankston Financial Services Pty Ltd, Corporate Authorised Representative No. 414682. Authorised Representative No.274069.

Qualifications

Blair holds an Advanced Diploma of Financial Services, has successfully passed the FASEA exam and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Blair 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 issues or proposed to be issues by a Government; and
- Superannuation



Blair Classon

Frankston Financial Services

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Frankston Financial Services Advice Fees and Charges

Ian Kemp 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.

Ian's hourly rate for Financial Services is \$350 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Ian's fee for the preparation of a Statement of Advice ranges from \$660 - \$3300 incl. GST depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.

Ian provides the option of ongoing reporting and advisory services. This fee is charged as an annual percentage of the value of your holding and is outlined in the table below. You will be notified of the cost involved prior to the commencement of any ongoing services.

Schedule of Fees for Ongoing Reporting and Advisory Services

For amounts less than \$500,000	1.10%
For amounts between \$500,000 - \$1,000,000	0.80%
For amounts over \$1,000,000	0.50%

Frankston Financial Services 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. Ian is a Director of Frankston Financial Services Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Ian May Receive

From time to time Ian 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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