Financial Adviser Profile

Overview

Anthony O'Hara has worked in the financial services industry for a number of years and is committed to building long-term relationships with clients by providing them with appropriate professional advice and personal ongoing service.

Anthony is committed to working with clients to help to clearly define their goals and design a financial plan to meet the needs of the individual.

Anthony O'Hara is a Sub-Authorised Representative of Mecury Pty Ltd T.A. Nascent Wealth Partners Pty Ltd, Corporate Authorised Representative No. 1285903. Authorised Representative No. 310502.

Qualifications

Anthony O'Hara holds a Master of Applied Finance, a Graduate Diploma in Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Anthony O'Hara is a CERTIFIED FINANCIAL PLANNER® with the Financial Planning Association of Australia and a Practitioner Member of the Association of Financial Advisers. Anthony is also a Tax (Financial) Adviser registered with the Tax Practitioners Board. Anthony abides by their Code of Professional Conduct.

Authorisations

Anthony O'Hara 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 strategies (inc. SMSF)
- Securities
- Standard Margin Lending Facility

Anthony O'Hara CFP®

Nascent Wealth Partners

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Nascent Wealth Partners Advice Fees and Charges

Anthony 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.

Anthony O'Hara's hourly rate for Financial Services is $330.00 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Anthony O'Hara'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.

Anthony 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.

Nascent Wealth Partners pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Anthony O'Hara is a Director of Nascent Wealth Partners and will receive a benefit from this company.

Other Benefits Anthony O'Hara May Receive

From time to time Anthony O'Hara 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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