

Financial Adviser Profile

Overview

I started my journey in financial services in 2015 as a Client Services Officer, and was promoted to Financial Adviser in 2017. I have completed my Advanced Diploma in Financial Planning, and I am currently studying for my Graduate Diploma.

As a husband, and father of 2 daughters, I pride myself on my family values, honesty and dependability. I enjoy working in partnership with people, with the aim of building long term, trusting and meaningful relationships.

Life experiences create a life story which provides an opportunity to grow, learn and share. As a former chef, I understand the stresses of juggling a busy work life and time with family and friends.

My journey in the kitchen taught me to be highly organised; to develop and implement systems that achieve results under pressure; to manage in a high stress and rapidly changing environment; and to work with a team to continually produce high quality results.

Buying my first home helped me realise the need for sound financial planning. I now use my knowledge and experience to help others to achieve their financial and lifestyle goals, and to have a positive impact on people's lives.

Jonathan Sims is a Sub-Authorised Representative of Mercury Pty Ltd T.A. Nascent Wealth Partners Pty Ltd, Corporate Authorised Representative No. 1285903. Authorised Representative No. 1256874.

Qualifications

Jonathan Sims holds an Advance Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Jonathan Sims is a member of the Association of Financial Advisers (AFA) and the Financial Planning Association of Australia (FPA) and abides by their code of professional conduct and ethics.

Jonathan Sims

Nascent Wealth Partners

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Authorisations

Jonathan Sims 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.

Business Name Advice Fees and Charges

Jonathan 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.

Jonathan Sims’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.

Jonathan Sims’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.

Jonathan Sims’s 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. Jonathan Sims is an equity owner of Nascent Wealth Partners and will receive a benefit from this company.

Other Benefits Jonathan Sims May Receive

From time to time Jonathan Sims 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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