

Financial Adviser Profile

Overview

Ian Shaw is a Chartered Accountant and authorised financial adviser with more than 25 years' experience helping individuals, families and business owners make informed financial decisions. Ian's financial advice specialty is self-managed superannuation, supported by extensive expertise in taxation, accounting and business advisory. Ian takes a practical and personable approach to client management, focusing on clear explanations, careful consideration of each client's circumstances and long term professional relationships built on trust.

Ian Shaw is a Sub-Authorised Representative of Ipswich Accountants Financial Pty Ltd (T/A Extrado Financial), Corporate Authorised Representative No. 1321804. Authorised Representative No. 1245709.

Qualifications

Ian Shaw holds a Bachelor of Business (Majoring in Accountancy); a CA Program – Institute of Chartered Accountants in Australia; holds a special Self Managed Superannuation Funds accreditation; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Ian Shaw is a member of Chartered Accountants Australia and New Zealand (CA ANZ); and Certified Practising Accountant (CPA) Australia; and abides by their code of professional conduct and ethics.

Authorisations

Ian Shaw is authorised to:

- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
 - making a recommendation that the person establish a self managed superannuation fund; or
 - providing advice to the person on contributions or pensions under a superannuation product
- provide class of product advice on the following:
 - superannuation products
 - basic deposit products.



Ian Shaw

Extrado Financial
14/21 Technology Drive
Augustine Heights QLD 4300

1300 398 723

ian@extrado.com.au
www.extrado.com.au

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Ipswich Accountants Financial Pty Ltd (T/A Extrado Financial)

Advice Fees and Charges

Ian Shaw will be paid Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Ian's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$1,800 and \$2,500 incl. GST.

Ipswich Accountants Financial Pty Ltd (T/A Extrado Financial) 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 Ipswich Accountants Financial Pty Ltd (T/A Extrado Financial) 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.

Ipswich Accountants Financial Pty Ltd is 100% owned by Ipswich Accountants Pty Ltd which provide accounting, administration and taxation services to our clients.

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Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

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This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.