Financial Adviser Profile

BAGGETTA & CO

Overview

Paul Baggetta, Founding Partner and Principal of Baggetta & Co, has been a Taxation Accountant for over 35 years, a Financial Planner since 1998 and in 1993 qualified as a Real Estate Licensee.

Paul also holds a Triennial Certificate (currently not trading), and operated his own Real Estate business for over 5 years as a second business. Paul currently holds the following memberships:

- Member of SMSF Association (SMSF Professionals Association of Australia)
- Fellow Member of IPA (Institute of Public Accountants)
- Member of NTAA (National Tax & Accountants' Association)

Paul Baggetta is an Authorised Representative of Capstone Financial Planning Pty Ltd, Authorised Representative Number 261469.

Qualifications

Paul Baggetta holds a Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Paul Baggetta is a member of SMSF Association, IPA & NTAA and abides by their code of professional conduct and ethics.

Authorisations

Paul 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; and
- Standard Margin Lending Facility.

Paul Baggetta

Baggetta & Co

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Baggetta & Co Advice Fees and Charges

Paul Baggetta 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.

Paul's hourly rate for Financial Services is $330 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Paul'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.

Paul Baggetta pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you.

Other Benefits Paul May Receive

From time to time Paul 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.

Capstone FINANCIAL PLANNING

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