

Financial Adviser Profile



Overview

Ashley has worked in the financial planning industry since 2005 and is passionate about providing excellent financial planning advice to individuals and businesses. Collins FP was founded to provide transparent and straightforward advice for those seeking insurance and superannuation strategies that are tax effective.

Ashley is a Sub-Authorised Representative of ACollinsfp Pty Ltd (trading as Collins FP), Corporate Authorised Representative No. 1260963. Authorised Representative No. 334402.

Qualifications

Ashley holds a Bachelor of Business (Finance & Accounting), Diploma of Financial Planning, Advanced Diploma of Financial Planning, Self-Managed Superannuation Fund Certificate, Aged Care Certification and meets the competency requirements under ASIC's Regulatory Guide RG146.

Areas of Specialisation

Ashley specialises in development of the following personalised financial planning strategies:

- Superannuation Consolidation;
- Self-Managed Super Funds;
- Personal Insurance Strategies including Life, Total & Permanent Disability, Trauma, Income Protection & Business Expenses;
- Direct Shares, Managed Funds, Cash Management Accounts & Fixed Interest Style Investments;
- Salary Sacrifice & Co-Contributions; and
- Retirement & Pre Retirement Planning including Transition to Retirement Pension, Allocated Pension & working with Centrelink to maximize your entitlements.

Special Interests

Ashley especially enjoys building relationships with clients over time to provide them with certainty in achieving their financial goals. In particular, Ashley ensures they have the appropriate superannuation strategies and personal insurance cover in place. Ashley also works closely with Accountants to provide individual, strategic financial advice and ongoing service to meet your personal and financial goals.



Ashley Collins

Collins FP

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Professional Memberships

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

Authorisations

Ashley 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 Fund; and
- Securities.

Collins FP Advice Fees and Charges

Ashley may be paid by either Financial Planning Advice Fees and/or Commissions 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.

Ashley's fee for the preparation of a Statement of Advice is based on the complexity and time required in preparing your recommendations. You will be notified of the cost involved prior to the commencement of any work if applicable.

Ashley provides the option of an ongoing reporting and advisory service. You will be notified of the cost involved prior to the commencement of an ongoing service.

ACollinsfp 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. Ashley Collins is a Director of ACollinsfp Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Ashley May Receive

From time to time Ashley 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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