

Financial Adviser Profile

Overview

Glynis Shea has over 20 years' experience in the financial services industry and has earned many industry awards during this period for her approach to dealing with clients and helping them to achieve their financial goals.

Glynis is authorised to provide advice on a wide range of services, including investment planning, wealth accumulation advice, risk planning management, superannuation advice (including self-managed superannuation funds), retirement planning advice, estate planning, Centrelink advice, Aged Care strategies and tax efficient strategies.

Glynis will listen closely and work hard to understand what money means to you and what you want to achieve, striving to simplify your financial life, organise your personal financial planning and optimise your overall wealth.

Glynis is passionate about ensuring fairness for her clients and is well known for going into battle for her clients where necessary.

Glynis Shea is a Sub-Authorised Representative of Teepookana Gold Pty Ltd, trading as Accrue Financial Services Corporate Authorised Representative No. 001256047. Authorised Representative No. 385543.

Qualifications

Glynis holds an Advanced Diploma of Financial Services (Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

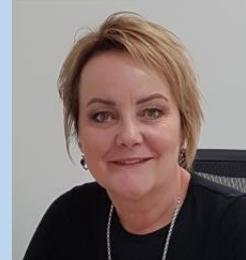
Professional Memberships

Glynis is a member of the Association of Financial Advisors and abides by their code of professional conduct and ethics.

Authorisations

Glynis 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.



Glynis Shea

Accrue Financial Services

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Mobile: 0438 523 976

Email address:

glynis@accruefinancialservices.com.au

Website address:

www.accruefinancialservices.com.au

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Accrue Financial Services Advice Fees and Charges

Glynis Shea 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.

Glynis' 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.

Glynis provides the option of ongoing reporting and advisory services. This fee is a minimum fixed fee of \$1,800 p.a., and up to 0.55% p.a. of the value of your holding incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Teepookana Gold 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. Glynis is a Director and salaried employee of Teepookana Gold Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Adviser May Receive

From time to time Glynis 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.