



ALEX BROWN

Strategic Financial Planners

Alexander Brown



Alex Brown Strategic Financial Planners
Corporate Authorised Representative No.1297611

Contact details

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Profile

Alex Brown Strategic Financial Planners is an experienced family-owned financial planning practice. Alex believes everyone deserves high-quality advice, regardless of circumstance or financial position.

Alex has more than 35 years of experience in the financial planning industry. He strives to resolve the major pain points that he has seen clients experience with financial planning throughout his long career, including cost and confusing advice.

Experience

Alex joined the financial planning industry in 1987 as a Life and as General Agent with AMP. In 1990, he started performing marketing and management roles for AXA Australia (formerly National Mutual), including General Agency Manager for the Northern Territory.

Alex then merged his financial planning business to lead the All Financial Services group, where he further developed his skills and qualifications.

This extensive experience has given Alex more than 30 years of senior management experience in an industry he loves. He's a highly motivated, visible and progressive leader with a reputation for developing and implementing innovative strategies that shape the future state of businesses.

His passion is reflected in the consistent and positive results he achieves. His analytical nature and ability to deliver to the highest standards are complemented by his attention to corporate governance and risk management. This ensures balanced yet progressive outcomes for clients.

Alex is a certified financial planner (CFP®), chartered tax adviser and SMSF specialist adviser (SSA™). He has a Diploma and Graduate Diploma of Financial Planning and holds memberships with the Financial Advice Association Australia, The Tax Institute and the SMSF Association.

Outside of work, Alex is a dedicated husband and father of two. He enjoys entertaining friends and family with fine wine and great food. Other pastimes include fishing and, most importantly, walking his Pugalier, Millie.

Qualifications and Professional Memberships

- Certified Financial Planner (CFP) designation
- Financial Advice Association Australia (FAAA)
- SMSF Specialist Adviser (SSA) designation
- Self-Managed Superannuation Fund Association
- Certified Tax Advisor (CTA) designation
- Diploma of Financial Planning (DipFP) at Deakin University
- Graduate Diploma of Financial Planning (Grad Dip.FP) at Kaplan

Memberships

- Financial Advice Association Australia (FAAA)
- SMSF Association of Australia
- The Tax Institute
- Family Business Australia
- Gawler Business Development Group

Alex Brown Strategic Financial Planners Pty Ltd is a Corporate Authorised Representative of Zebra Financial Services Pty Ltd (1297611)(ZFS). Alex Brown is authorised by ZFS (Zebra Financial Services) (Representative Number 273564) to provide financial product advice and services in the categories below:

Alex Brown is authorised by ZFS (Zebra Financial Services) to provide personal advice, and general advice and to deal in:

- Deposit Products
- Non-Basic Deposit Products
- Life Insurance Risk Products
- Managed Investments
- Securities
- Retirement Savings Account Products
- Superannuation
- Government Debentures

As part of his services to you, Alex Brown can provide advice on the following:

- Wealth Creation and Retirement Planning
- Personal and Corporate Superannuation
- Personal and Business Risk Insurance
- Managed Portfolio Services
- Cash Flow and Debt Reduction Strategies
- Portfolio Review and Ongoing Service

How do we charge our clients for our services?

Financial Planning Fees	<p>Before providing advice or service, your adviser may charge you an upfront fee for services based on either:</p> <ul style="list-style-type: none">• Time spent developing advice or implementing services• A fixed dollar amount• A percentage of funds invested; or• A combination of these methods <p>These fees will be disclosed before service is provided to you and you will need to agree to our terms of engagement.</p>
Adviser Service Fee	<p>When you elect to have ongoing advice, you will be charged a fee, which will be disclosed to you at the time of making the arrangement.</p>
Commissions	<p>Commissions on insurance products are based on a percentage of the premium, which is the industry standard practice.</p>
Other Remuneration	<p>Other remuneration may also be paid to ABSFP by the product provider for the duration of the investment. The amount of any such remuneration will be disclosed to you.</p>
Referrals	<p>If you have been referred to your adviser by a third party, (e.g., an accountant) the third party may receive a fee, commission, or other benefits for the referral. This fee comes out of the fees received by ABSFP and your adviser and does not represent an additional cost to you.</p>
Alternative Remuneration	<p>If ABSFP or your adviser receives alternative remuneration such as entertainment and gifts from financial institutions, in accordance with the Industry Code of Practice, ABSFP and your adviser maintain a register of material alternative remuneration paid and received. Copies of these registers are available on request.</p>
Post FSG notification benefit	<p>There will be occasions when our benefit cannot be ascertained at the time of issue of the Financial Service Guide and in those cases, once we do ascertain the amount or nature of the benefit to us, we will inform you as soon as practical.</p>

Fee Table

Fee Type	Amount
Adviser service fee Client program	Ongoing \$5,400 - \$10,000 per annum
Risk commissions	Upfront From 1 January 2020 66%
	Ongoing 22%
	Flat commission range 25% - 35%
Plan fee	\$1,300 - \$10,000
Hourly rate	Additional advice \$330 - \$550 per hour

*All fees are GST inclusive

THE FINANCIAL SERVICES ARE OFFERED TO YOU BY A REPRESENTATIVE

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