

Financial Adviser Profile

Overview

I am passionate about providing quality and affordable financial advice to clients. I have over 15 years' experience in the financial services industry including major banks, superannuation funds and independent advisory firms specialising in retirement planning, defined benefit schemes and age care advice.

With genuine care and understanding, I use my expertise and knowledge to assist clients to achieve peace of mind for their financial situation and lifestyle goals.

In my spare time I enjoy traveling and reading. I also enjoy Newcastle beaches walks with my fur baby, Bailey.

Renee Tang is a Sub-Authorised Representative of MySuper Advisory Group Pty Ltd, Corporate Authorised Representative No. 1315617. Authorised Representative No. 1262873.

Qualifications

Renee Tang is a Certified Financial Planner (CFP®) and holds a Bachelor of Business (Accounting and Financial Planning), Diploma of Financial Planning and has completed the required bridging units. She also holds an aged care accreditation and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Renee Tang is a member of the Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

Authorisations

Renee Tang is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation.



Renee Tang

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MySuper Advisory Group Advice Fees and Charges

Renee Tang 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.

Renee'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 \$3,300 and \$6,600 incl. GST.

Renee provides the option of ongoing reporting and advisory services. This may be a fixed fee, typically between \$3,000 p.a. and \$4,200 p.a. incl. GST. The fee will vary depending on the complexity of the services to be provided.

MySuper Advisory Group 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. Renee is a Director of MySuper Advisory Group Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Renee May Receive

From time to time Renee 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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