Financial Adviser Profile

Overview

Tom is a Certified Financial Planner (CFP®), and FAAA member (Financial Advice Association of Australia) serving as a Senior Financial Advisor and joint Director at MySuper Advisor. With over 30 years' experience – particularly in NSW Public Sector and Commonwealth super schemes – he and his team assist clients from Newcastle, Lake Macquarie, Hunter, and Port Stephens, with online appointments available for other regions.

Tom offers clear financial advice to help people feel confident about their lifestyle goals and ensures clients implement their personal plans effectively.

Tom Muir is a Sub-Authorised Representative of MySuper Advisory Group Pty Ltd, Corporate Authorised Representative No. 1315617. Authorised Representative No. 1006712.

Qualifications

Tom Muir is a Certified Financial Planner (CFP®) and holds a Bachelor of Business (Marketing), Graduate Diploma of Financial Planning and Diploma of Financial Services (Financial Planning); and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Tom Muir 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 & Payment Products
- Retirement Savings Accounts ("RSA") products
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Superannuation
- Securities.

Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.

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MySuper Advisory Group Advice Fees and Charges

Tom Muir 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.

Tom'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.

Tom 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 service 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. Tom is a Director of MySuper Advisory Group Pty Ltd and will receive a benefit from this company.

Other Benefits Tom May Receive

From time to time Tom 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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This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.