Financial Adviser Profile

Overview

Vicki Martin commenced being known as a financial adviser in 2000 after completing her RG146 financial advice qualification, extending her existing knowledge, experience and qualifications in accounting, taxation and stockbroking. Vicki has also held CFP status since 2006.

Some of the attributes clients have used to describe Vicki include her being practical, personable, is able to clearly illustrate the "big picture", and that she truly cares. This allows our clients to be part of a relationship where the focus is on understanding and communication, and advice is tailored for a person's individual needs and objectives.

Vicki Martin is a Sub-Authorised Representative of Goal Financial Services Pty Ltd, Corporate Authorised Representative No. 1272137. Authorised Representative No. 231603.

Qualifications

Vicki is a Certified Financial Planner (CFP®) and holds a Bachelor of Business (Major: Accounting; Sub-Major Business Law).

Professional Memberships

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

Authorisations

Vicki 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
- Securities
- Standard Margin Lending Facility.

Vicki Martin

Goal Financial Services

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Goal Financial Services Advice Fees and Charges

Goal Financial Services will 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.

Vicki's 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.

Vicki provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

Goal Financial Services pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Vicki is a salaried employee of Goal Financial Services and will receive a salary/benefit from this company.

You may have been referred to us by another professional such as your solicitor, mortgage broker or accountant. Our client's best interests are important to us, therefore we do not pay or receive referral fees.

Other Benefits Vicki May Receive

From time to time Vicki 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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