

Financial Adviser Profile

Overview

Stephanie Stafford is a Financial Planner with a decade of industry experience under her belt. She firmly believes that every client is unique and deserves personalised advice. With her sharp analytical skills, Stephanie crafts bespoke strategic and investment recommendations to help her clients reach their financial goals. You can count on her to deliver high-quality, relevant advice tailored to your specific needs.

As a mum, daughter, sister, and aunty, Stephanie brings a warm, relatable touch to her work. She understands the importance of balancing life's demands and uses her personal insights to help clients identify and achieve their financial and lifestyle objectives. Whether you're planning for retirement, building wealth or looking to protect what you already have, Stephanie is here to guide you every step of the way.

Stephanie is a Sub-Authorised Representative of Goal Financial Services Pty Ltd, Corporate Authorised Representative No. 1272137. Authorised Representative No. 1311911.

Qualifications

Stephanie holds a Master of Financial Planning and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Stephanie Stafford 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
- Self Managed Superannuation Funds
- Securities.



Stephanie Stafford

Goal Financial Services

Suite 4, Level 1
64 Talavera Road
Macquarie Park
New South Wales 2113

PO Box 4134
Macquarie Centre
New South Wales 2113

Phone: 1300 334 625
Mobile: 0499 322 600

steph@goalfs.com.au
www.goalfs.com.au

Financial Adviser Profile



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.

Stephanie'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.

Stephanie 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. Stephanie 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 Stephanie May Receive

From time to time Stephanie 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.

Version 4.2



Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.