Financial Adviser Profile

ORBIT
FINANCIAL SERVICES

Overview

Alison Adamson commenced her career in financial advice in 2008 with one of Australia's leading financial institutions based on the Gold Coast and a boutique advisory based in Northern NSW. She has a passion for quality advice and is driven by the positive impact a good financial plan can make to her clients' – an outcome she's seen unfold many times over the course of her career.

Alison is a Sub-Authorised Representative of Orbit Financial Services Pty Ltd, Corporate Authorised Representative No. 1261981. Authorised Representative No. 332054.

Qualifications

Alison holds a Masters of Financial Planning, Advanced Diploma of Financial Services (Financial Planning), a Diploma of Financial Services (Financial Planning) and a Bachelor of Arts (Asian Studies) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Alison 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; and
- Standard Margin Lending Facility.

Alison Adamson

Orbit Financial Services

Suite 14, 2 Waterfront Place
Robina QLD 4226

PO Box 340
Robina Town Centre
Robina QLD 4230

Phone: 07 5661 9720
Mobile: 0449 819 480

alison@orbitfs.com.au
www.orbitfs.com.au

Financial Adviser Profile

ORBIT
FINANCIAL SERVICES

Orbit Financial Services Advice Fees and Charges

Alison will be paid by Financial Planning Advice Fees 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.

Alison'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.

Orbit Financial Services 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. Alison is a Director of Orbit Financial Services Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Alison May Receive

From time to time Alison 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.

Capstone
FINANCIAL PLANNING

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.