

Financial Adviser Profile

Overview

Robert has been practising as a Senior Financial Planner for over 20 years and previously as a Tax Accountant for over 5 years. He is both a Certified Financial Planner and a Certified Practising Accountant.

Our Client Value Proposition:

Good advice that is professional, easy to understand and achieves great outcomes.

Robert enjoys working with all types of clients, helping them with sensible, tailored strategies and straightforward advice so that you can relax and focus on turning dreams into reality. He has a range of financial strategies to help you make the most of every opportunity.

Would you like to retire early, be smart with your savings, spend more time with the family, pay off your mortgage faster, travel overseas, set up the kid's education, reduce tax, do some home renovations or simply consolidate your super? Robert can work with you to help you identify and shape your goals and take an objective look at your finances.

Robert Gangi is a Sub-Authorised Representative of My Financial Planner Pty Ltd, Corporate Authorised Representative No. 1263186. Authorised Representative No. 433902.

Qualifications

Robert Gangi holds a Bachelor of Business (Accounting), Certified Financial Planner CFP, Certified Practising Accountant and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Robert Gangi is a member of the Financial Planning Association and CPA Australia and abides by their code of professional conduct and ethics.



Robert Gangi

My Financial Planner

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Authorisations

Robert Gangi 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; and
- Superannuation.

My Financial Planner Advice Fees and Charges

Robert Gangi 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.

Robert’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. For new clients this typically ranges from \$3,300 to \$16,500 incl. GST. You will be notified of the costs involved prior to the commencement of any work.

Robert provides the option of ongoing reporting and advisory services. This fee can be either a fixed fee of \$2,200 to \$16,500 p.a. or a percentage up to 1.10% p.a. of the value of your holding incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

For any other work carried out, Robert’s hourly rate for Financial Services is \$330 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

My Financial Planner 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. Robert is a Director of My Financial Planner Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Adviser May Receive

From time to time Robert 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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