

Financial Adviser Profile

Overview

Robert commenced providing financial advice in 2007. He joined Watson and Sons Advisory in 2016.

Robert specialises in helping people structure their protection, including through complex structures such as SMSF's, businesses and insurance trusts. Robert also has experience with investments, cash flow structuring for individuals and retirement planning.

Robert Watson is a Sub-Authorised Representative of Watson and Sons Advisory Pty Ltd, Corporate Authorised Representative No. 335384. Authorised Representative No. 462622.

Qualifications

Robert Watson holds a Masters of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Authorisations

Robert Watson 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

Robert Watson

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Watson and Sons Advisory Pty Ltd Advice Fees and Charges

Robert Watson 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.

Watson and Sons Advisory 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 Watson is a salaried employee of Watson and Sons Advisory Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Robert 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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