

ADVISER PROFILE

TANYA HOFBAUER

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OVERVIEW

Tanya has been involved in the SMSF advice area since 1999 and has built an in-depth knowledge of how superannuation works, utilising strategies to minimise tax and increase superannuation wealth.

Tanya Hofbauer is a Sub-Authorised Representative of Paris Financial Services Pty Ltd, Corporate Authorised Representative No. 357928. Authorised Representative No. 319660.

QUALIFICATIONS

Tanya Hofbauer holds a Bachelor of Commerce (Accounting and Financial Planning) and meets the competency requirements under ASIC's Regulatory Guide RG 146.

PROFESSIONAL MEMBERSHIPS

Tanya Hofbauer is an Associate member of CPA and abides by their code of professional conduct and ethics.

AUTHORISATIONS

Tanya Hofbauer is authorised to:

- provide financial product advice on self-managed superannuation funds;
- arrange to deal in an interest in a self-managed superannuation fund;
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
 - making a recommendation that the person establish a self-managed superannuation fund; or
 - providing advice to the person on contributions or pensions under a superannuation product;
- provide class of product advice on the following:
 - superannuation products;
 - basic deposit products.



Head Office:

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PARIS FINANCIAL SERVICES FEES AND CHARGES

Tanya Hofbauer may 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.

Tanya's fee for the preparation of 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.

Paris 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. Tanya Hofbauer is a salaried employee of Paris Financial Services Pty Ltd and will receive a salary from this company.

OTHER BENEFITS TANYA MAY RECEIVE

From time to time Tanya 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.