



SHOREBRIDGE
WEALTH ADVISERS

Financial Adviser Profile

Seeking professional advice to help achieve your financial goals is an important investment in your future. We are committed to working with you to help you define your goals and design a financial plan to meet your needs.

Overview

Jamie has over 21 years experience in the financial services industry.

Jamie is passionate about working with clients to fully understand their needs and financial goals and providing tailored advice to meet these goals.

Jamie has a young family with three children at the centre of his world. As such, he fully appreciates the value of early and considered financial planning for the future.

Jamie Andersen is a Sub-Authorised Representative of Shorebridge Wealth Advisers Pty Ltd, Corporate Authorised Representative No. 1287265. Authorised Representative No. 311734.

As a Director of Shorebridge Wealth Advisers Jamie is part of a dedicated team of focused financial service professionals dedicated to helping their clients secure their financial future.

Qualifications

Jamie meets the competency requirements under ASIC's Regulatory Guide RG 146. Jamie holds the following accreditations:

- Business Degree (Finance & Accounting) from UTS;
- Advanced Diploma of Financial Services (Financial Planning);
- ALPA ASX Listed Securities accreditation;
- SMSF accreditation.

Professional Memberships

Jamie is a member of the Association of Financial Advisers (AFA) and abides by their code of professional conduct and ethics.



Jamie Andersen

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Authorised Representative
Number, issued by the Australian
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Commission: 311734

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Authorisations

Jamie Andersen 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 (SMSF); and
- Securities.

Shorebridge Wealth Advisers Advice Fees and Charges

Jamie Andersen 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.

Jamie Andersen’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.

Jamie Andersen provides the option of ongoing reporting and advisory services. This fee is can be either a fixed fee or a percentage value of your holding incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Shorebridge Wealth Advisers pays a fixed licensing fee to Capstone Financial Planning Pty Ltd who will receive all revenue earned from the financial services provided to you. Jamie is a Director of Shorebridge Wealth Advisers and will receive a salary/benefit from this company.

Other Benefits Jamie Andersen May Receive

From time-to-time Jamie Andersen 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 4.0