



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

I am passionate about knowing my clients and continuing their relationships to ensure their financial needs and goals align with changing requirements throughout their life. I pride myself on having a strong history of long-term relationships using an objective based advice process to apply strategies to help clients deliver on their objectives/goals that are in their best interests. I want to ensure that my clients can contact me anytime for updated financial advice and for help with anything they need.

John Nisbett is a Sub-Authorised Representative of Shorebridge Wealth Advisers Pty Ltd, Corporate Authorised Representative No.1287265. Authorised Representative No. 1003887.

Qualifications

I have a Diploma of Financial Planning and I am a Certified Financial Planner. I hold a Proper Authority and meet the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

John Nisbett is a member of Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

John is a Justice of the Peace in NSW Registration number 185323.



John Nisbett

Certified Financial Planner Dip.FP
Member of FPA. JP.
Authorised Representative
Number, issued by the Australian
Securities and Investments
Commission: 1003887

Suite 302, Level 3,
10 Help Street,
Chatswood NSW 2067

Postal: PO Box 70
Chatswood NSW 2057

Mobile: 0412-269 -144
jnisbett@shorebridge.com.au
www.shorebridge.com.au



SHOREBRIDGE
WEALTH ADVISERS

Financial Adviser Profile

Authorisations

John Nisbett 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;

Shorebridge Wealth Advisers Advice Fees and Charges

John Nisbett will be paid through 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.

John Nisbett’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.

John Nisbett provides the option of ongoing reporting and advisory services. This fee 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. John Nisbett is a salaried employee of Shorebridge Wealth Advisers and will receive a salary/benefit from this company.

Other Benefits John Nisbett May Receive

From time to time John 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



Level 14, 461 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.