

Financial Adviser Profile

Overview

Mark is a passionate Certified Financial Planner with more than 20 years' experience in the financial services industry, having previously assisted individuals, families, retirees, corporate executives, government employees and the high net worth with their respective financial strategies. With a focus on retirement planning, personal protection, self-managed superannuation and investment management, Mark adopts an assortment of relevant taxation and superannuation strategies to provide customised outcomes for his clients.

In line with Mark's own ethics and philosophy, Evolution Road Wealth Management embraces a rigid service proposition for its clients. The emphasis is on building and maintaining strong, trusting relationships, with a view to securing the financial future for all generations. He believes through education, we can nurture a vision to ensure more consumers and businesses proactively choose to access professional financial services.

Mark Power is a Sub-Authorised Representative of Evolution Road Wealth Management Pty Ltd, Corporate Authorised Representative No. 1249365. Authorised Representative No. 444276.

Qualifications

Mark Power holds the following qualifications and meets the competency requirements under ASIC's Regulatory Guide RG 146:

- Bachelor of Business (University of Newcastle)
- Graduate Diploma of Financial Planning (SIA)
- Certified Financial Planner (Financial Planning Association)

Professional Memberships

Mark Power is a member of Financial Planning Association of Australia (FPA) and abides by their code of professional conduct and ethics.



Mark Power

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Management Pty Limited

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Authorisations

Mark Power 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; and
- Standard Margin Lending Facility

Evolution Road Wealth Management Advice Fees and Charges

Mark Power 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.

The 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.

The option of ongoing reporting and advisory services will be offered. A minimum subscription fee of \$3,300 per annum applies. You will be notified of the cost involved prior to the commencement of any ongoing services.

Evolution Road Wealth Management 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. Mark Power is a Director of Evolution Road Wealth Management and will receive a benefit from this company.

Other Benefits Mark Power May Receive

From time to time Mark Power 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.