

# Financial Adviser Profile



## Overview

Paul Bradford is a Certified Financial Planner® with more than 20 years of solid and diversified experiences in financial planning; with 7 years in the local big four banks and 3 years abroad as a senior planner advising expatriates.

Driven by his personal belief that sound financial advice maximises and protects financial positions and lifestyles in different stages of life, Paul established his boutique practice called Mentor Financial Service Group Pty Ltd in 2006 and his clientele has grown over the years through word of mouth.

Paul builds strong long term relationships with his clients and guides them along their journey to achieve their financial objectives, lifestyle goals and long term financial success.

Paul Bradford is an Authorised Representative of Mentor Financial Services Group Pty Ltd, Corporate Authorised Representative No. 1281998. Authorised Representative No. 304959.

## Qualifications

Paul Bradford holds a Bachelor of Business, Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Paul has passed his FASEA exam and achieved the required FASEA educational requirements.

## Professional Memberships

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

## Authorisations

Paul Bradford 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.



### Paul Bradford

CFP® BBus Dip FP

Principal Adviser

Mentor Financial Services Group

PO Box 2208  
Hawthorn VIC 3122

P (03) 9886 0623

M 0415 538 375

E [paul@mentorfs.com.au](mailto:paul@mentorfs.com.au)

[www.mentorfs.com.au](http://www.mentorfs.com.au)

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## Mentor Financial Services Group Pty Ltd Advice Fees and Charges

Paul Bradford 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.

Paul'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.

Paul provides the option of ongoing reporting and advisory services. This fee will be a fixed fee between \$3,300 and \$12,100 per annum inclusive of GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Mentor Financial Services Group 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. Paul is a Director of Mentor Financial Services Group Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Paul May Receive

From time to time, Paul 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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Level 14, 461 Bourke Street  
Melbourne Victoria 3000  
1300 306 900  
[www.capstonefp.com.au](http://www.capstonefp.com.au)

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