BeReady.
FINANCIAL PLANNING

Financial Adviser Profile

Overview

Be Ready Financial Planning was founded in February 2012 and remains in its original office in Hillside. Darren Shaw has been in the industry many years having begun his career in 1997.

Our client value proposition is summarised as follows:

“As part of the local community you will be offered a comprehensive advice process with a personally tailored plan to assist you achieve what is most important to you.”

We specialise in pre-retirement, retirement planning and risk insurance needs.

Darren Shaw is a Sub-Authorised Representative of Be Ready Financial Planning Pty Ltd, Corporate Authorised Representative No.1265160. Authorised Representative No. 416756.

Qualifications

Darren Shaw holds a Diploma in Financial Planning and meets the competency requirements under ASIC’s Regulatory Guide RG 146.

Professional Memberships

Darren Shaw is a member of AFA and abides by their code of professional conduct and ethics.

Authorisations

Darren Shaw 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;
- Securities;

Darren Shaw

Be Ready Financial Planning Pty Ltd

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Be Ready Financial Planning Advice Fees and Charges

Darren Shaw 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.

Darren'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.

Darren Shaw provides the option of ongoing reporting and advisory services. Fees are fixed dollar incl. GST. Costs depend on the complexity involved and the time taken to manage individual's situations. You will be notified of the cost involved prior to the commencement of any ongoing services.

Be Ready Financial Planning pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Darren Shaw is a Director of Be Ready Financial Planning Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Darren Shaw May Receive

From time to time Darren 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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