

Financial Adviser Profile

Overview

Vito D'Alessandri is a Certified Financial Planner™ and Accredited Aged Care Professional™. Since 1990 Vito has been assisting people with their personal finances, retirement planning and personal risk protection.

In more recent times he has added to this a new focus on the financial needs of the elderly, especially for those that need to enter an Aged care Facility. Vito now holds the additional designation of an Aged Care Professional™ having completed appropriate training in this regard. Vito is a member of the Financial Planning Association of Australia and is committed to helping clients make informed and smart decisions about their financial future.

Vito is regularly praised by his clients for his ability to explain complex financial information in easy to understand language.

Vito believes that everyone could benefit from having a team of specialist advisers in their corner and that EDUCATION is the key ingredient for people to achieve their goals Vito D'Alessandri is an authorised representative (No.234615) of Capstone Financial Planning (AFSL No. 223135).

Vito D'Alessandri is a Sub-Authorised Representative No. 234615 of Dallas Consulting Pty Ltd, Corporate Authorised Representative No. 295438.

Qualifications

Vito D'Alessandri holds a Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Vito D'Alessandri is a member of Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Vito D'Alessandri 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;



Vito D'Alessandri

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Lifetime Advice Advice Fees and Charges

Vito D'Alessandri 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.

Vito'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.

Vito provides the option of ongoing reporting and advisory services. This fee is a fixed fee or % p.a. of the value of your holding incl. GST.

You will be notified of the cost involved prior to the commencement of any ongoing services.

Dallas Consulting 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. Vito is a Director of Dallas Consulting Pty Ltd and will receive a benefit from this company.

Other Benefits Vito May Receive

From time to time Vito 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.