

## ADVISER PROFILE

### Amanda Padley

Shop 1,  
Beachmere Central Shops,  
878 Beachmere Rd,  
Beachmere QLD 4510

Postal Address  
4 Dixon Court  
Beachmere QLD 4510

Ph: 0405 107 094  
Fax: 07 5496 8191



**Pelican**  
**Financial Services Pty Ltd**  
Email: [info@pelicanfinancialservices.com](mailto:info@pelicanfinancialservices.com)  
[www.pbuzs.com.au](http://www.pbuzs.com.au)



#### OVERVIEW

Amanda Padley has been practicing bookkeeping and accounting for over 30 years. Her focus has been in management accounting (essentially budgeting and forecasting financial goals) and in recent years, taxation services. Amanda Padley's mission statement is that you can't change the past, but you can make changes today which will impact your future and this is the space where she has the expertise.

Amanda Padley is a Sub-Authorised Representative of Pelican Financial Services Pty Ltd, Corporate Authorised Representative No. 1243666. Authorised Representative No 1243922.

#### QUALIFICATIONS

Amanda Padley holds a double degree in Commerce majoring in Accounting and Information Systems, a postgraduate degree in professional accounting and a Masters in Professional Accounting majoring in Financial Planning. Whilst completing her Masters of Professional Accounting she completed the advanced financial planning modules which enabled her to meet the competency requirements under ASIC's Regulatory Guide RG 146.

#### PROFESSIONAL MEMBERSHIPS

Amanda Padley is a member of the Institute of Public Accountants and Tax Practitioner Board and abides by their code of professional conduct and ethics.

#### AUTHORISATIONS

Amanda Padley is authorised to:

- provide financial product advice on self-managed superannuation funds;
- arrange to deal in an interest in a self-managed superannuation fund;
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for:
  - making a recommendation that the person establish a self-managed superannuation fund; or
  - providing advice to the person on contributions or pensions under a superannuation product;
- provide class of product advice on the following:
  - superannuation products;
  - basic deposit products.



**Head Office:**  
Level 14, 461 Bourke Street  
Melbourne Victoria 3000  
1300 306 900  
[www.capstonefp.com.au](http://www.capstonefp.com.au)



**Pelican**  
**Financial Services Pty Ltd**  
Email: [info@pelicanfinancialservices.com](mailto:info@pelicanfinancialservices.com)  
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**PELICAN FINANCIAL SERVICES PTY LTD FEES AND CHARGES**

Amanda Padley may 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.

Amanda Padley's fee for the preparation of 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.

Where financial planning advice fees are payable, Capstone Financial Planning will receive all revenue in the first instance. Pelican Financial Services 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. Amanda Padley is the Managing Director of Pelican Financial Services Pty Ltd and will receive a salary/benefit from this company.

**OTHER BENEFITS AMANDA PADLEY MAY RECEIVE**

From time to time Amanda Padley 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.