Financial Adviser Profile

TANDEM WEALTH

Overview

Scott has over 24 years experience in the financial services industry and has been providing professional financial planning advice and solutions to his valued clients since 2003.

Scott currently holds the CERTIFIED FINANCIAL PLANNER® designation, which is the highest standard of certification for financial planning worldwide in over 24 countries, assuring you that Scott works to the highest professional and ethical standard.

Prior to becoming a Financial Adviser, Scott enjoyed a successful career in financial services working for some of Australia's largest wealth management companies and gained experience and exposure to superannuation and retirement asset management.

Scott prides himself on developing professional and personal working relationships with his clients and is passionate about educating clients so they understand the reasons behind the goals they are looking to achieve. This enables him to partner with his clients to build and protect their wealth and ensure funds can always be provided when they are needed most.

Scott Mackett is a Sub-Authorised Representative of Mackett Wealth Pty Ltd, Corporate Authorised Representative No. 1294353. Authorised Representative No. 248222.

Qualifications

Scott Mackett holds the following qualifications:

- Advanced Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Financial Planning)
- Diploma of Finance & Mortgage Broking Management
- Certificate IV Financial Services (Finance/Mortgage Broking)

Scott meets the competency requirements under ASIC's Regulatory Guide RG 146.

Qualifications (non-finance related)

Scott Mackett holds the following non-finance related qualifications:

- JP – Justice of the Peace (Attorney General's Department of NSW)

Professional Memberships

Scott Mackett is a member of the following organisations and abides by their code of professional conduct and ethics.

- Financial Planning Association of Australia (FPA)
- Mortgage and Finance Association of Australia (MFAA)

Scott Mackett CFP®

Tandem Wealth

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Professional Designations

Scott Mackett holds the following professional designations:

- CERTIFIED FINANCIAL PLANNER® professional (FPA)

Authorisations

Scott Mackett 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;
- Standard Margin Lending Facility.

Tandem Wealth Advice Fees and Charges

Scott Mackett 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.

Scott'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. It is important to note that Scott will not proceed with preparing any advice for you where the benefit received does not exceed the initial advice fees associated with the advice.

Scott provides all of his valued clients with ongoing reporting and advisory services. This Annual Advice Service enables Scott to conduct review meetings and recommend changes to your plans and strategies (if required). The annual advice received will help you stay on track to meet your goals. The charge for these services is a fee up to 1.10%pa of the value of your holding incl. GST (minimum fee of $3,300pa applies for balances under $300,000). You will be notified of the cost involved prior to the commencement of any ongoing services.

Tandem Wealth pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Scott is a Director and salaried employee of Tandem Wealth and will receive a salary/benefit from this company.

Other Benefits Scott May Receive

From time to time Scott 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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