Financial Adviser Profile

Overview

Andrew Hall is a Financial Planner and SMSF Specialist with over 15 years of industry experience.

Known for his calm, thorough and client-centric approach, Andrew takes the time to understand each individual's values, aspirations and challenges, assuring that every financial strategy aligns with their broader life goals.

Andrew believes that financial advice should be as personal as the goals it supports. Whether clients are navigating major life transitions, growing their wealth or building a legacy, he offers tailored solutions grounded in transparency, empathy and proven expertise.

Andrew Hall is a Sub-Authorised Representative of Walker Wayland (NSW) Financial Services Pty Ltd, Corporate Authorised Representative No. 258381. Authorised Representative No. 1309076.

Qualifications

Andrew holds a Bachelor of Arts and a Graduate Diploma in Financial Planning; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Andrew is a member of the SMSF Professionals' Association of Australia and abides by their code of professional conduct and ethics.

Authorisations

Andrew Hall is authorised to provide advice and deal in the following financial products:

- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit and 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
- Standard Margin Lending Facility.

Andrew Hall

Walker Wayland (NSW) Financial Services Pty Ltd

Level 11, Suite 11.01
60 Castlereagh Street
Sydney NSW 2000

GPO Box 4836,
Sydney NSW 2001

Phone: (02) 9951 5400
Mobile: 0404 227 533

andrew.hall@wwnsw.com.au
https://wwnsw.com.au/

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Walker Wayland (NSW) Advice Fees and Charges

Andrew Hall will be paid Advice Fees and Commissions as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Andrew's hourly rate for Financial Services is $350 incl. GST and his 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.

Walker Wayland (NSW) 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. Andrew is a salaried employee of Walker Wayland (NSW) Financial Services Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Andrew May Receive

From time to time Andrew 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.

Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au

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This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.