

Financial Adviser Profile

Overview

As a financial adviser, I am passionate about helping individuals and businesses achieve their financial goals. With a strong foundation and years of experience in financial planning, I work closely with my clients to create tailored solutions that align with their unique needs and aspirations. My approach focuses on building trust, providing clear and practical advice, and empowering clients to make informed decisions for a secure financial future.

Courtney Moores is a Sub-Authorised Representative of Mosaic Wealth Pty Ltd, Corporate Authorised Representative No. 1314941. Authorised Representative No. 1263262.

Qualifications

Courtney Moores holds a Diploma of Financial Planning, specialist SMSF accreditation and Bachelor of Science (Exercise and Health Science); and meets the competency requirements under ASICs Regulatory Guide RG 146.

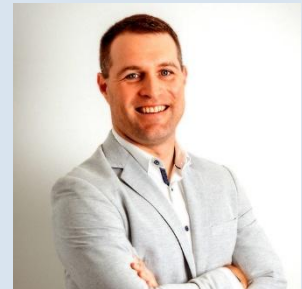
Authorisations

Courtney Moores 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.

Restrictions – Securities Only

This authorised representative is only authorised to give class of product advice in relation to Securities.



Courtney Moores

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Mosaic Wealth Advice Fees and Charges

Courtney 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.

Courtney's hourly rate for Financial Services is \$220 to \$660 incl. GST. We will notify you of the fee charged prior to commencing any work if applicable.

Mosaic 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. Courtney is a Director of Mosaic Wealth Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Courtney May Receive

From time to time Courtney 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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