

Financial Adviser Profile

Overview

Build wealth, live life, leave legacy.

Jonathan Hosford is a seasoned adviser with over 14 years experience in the financial planning industry. Passionate about helping individuals and families build their wealth so that they can live life to the fullest, Jonathan partners with his clients to develop a robust financial plan that meets their individual goals and then provides them the tools and accountabilities they need throughout the journey to achieve these goals.

Besides being passionate about empowering individuals and families to live a life worth remembering, Jonathan enjoys spending time with his wife and two children.

Jonathan Hosford is a Sub-Authorised Representative of Legacy Financial Pty Ltd, Corporate Authorised Representative No. 1305332. Authorised Representative No. 1002956.

Qualifications

Jonathan Hosford holds an Advanced Diploma of Financial Planning, Bachelor of Business and Bachelor of Science; and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Jonathan Hosford is a member of the Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

Authorisations

Jonathan Hosford 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
- Securities.

Jonathan Hosford

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Legacy Financial Advice Fees and Charges

Jonathan Hosford 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.

Jonathan charges a fee of \$330 incl. GST for his initial consultation. This fee is incorporated into the Statement of Advice (SoA) fee if you decide to proceed with having an advice document prepared.

Jonathan's fee for the preparation of an SoA and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$3,300 and \$11,000 incl. GST.

Jonathan provides the option of ongoing reporting and advisory services. This may be a fixed fee, typically between \$2,200 and \$8,800 incl. GST. The fee will vary depending on the complexity of the service to be provided.

Legacy Financial 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. Jonathan is a Director of Legacy Financial Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Jonathan May Receive

From time to time Jonathan 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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