# Financial Adviser Profile

## Overview

Rochelle Green has worked in the Financial Services industry since 2013. Rochelle is passionate about providing meaningful and easy to understand financial advice to her clients.

Rochelle prides herself on improving her clients' financial wellbeing and building their confidence around their own financial decisions. She enjoys developing long term relationships with her clients to help guide them through all stages of life. Rochelle sees financial advice as a way of providing certainty and peace of mind to her clients and their goals.

Rochelle grew up on a farm in Corryong in the Upper Murray and has lived in the Albury/Wodonga area since 2007. Outside of financial planning Rochelle is kept busy with her young son and daughter. She enjoys netball and spending time camping and travelling with her family.

Rochelle Green is a Sub-Authorised Representative of Be Ready Wealth Pty Ltd, Corporate Authorised Representative No. 1264704. Authorised Representative No. 1004014.

## Qualifications

Rochelle holds a Bachelor of Business (Management) a Graduate Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

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

## Authorisations

Rochelle Green 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.


**Rochelle Green**

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## Be Ready Wealth Advice Fees and Charges

Rochelle 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.

Rochelle'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.

Rochelle provides the option of ongoing reporting and advisory services. This fee is a fixed fee with a minimum $750 and a maximum of $15,000 p.a. incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Be Ready Wealth 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. Rochelle is a salaried employee of Be Ready Wealth Pty Ltd and will receive a salary/benefit from this company.

## Other Benefits Rochelle May Receive

From time-to-time Rochelle 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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