

# Financial Adviser Profile



## Overview

Michael Molloy Pty Ltd has been operating since 1988 and specialises in superannuation, investment, retirement planning and risk insurance.

Michael Molloy is a Sub-Authorised Representative of Michael Molloy Pty Ltd t/as Casey Investment Group, Corporate Authorised Representative No. 237212. Authorised Representative No. 237795.

## Qualifications

Michael Molloy holds a Diploma of Financial Planning, an Advanced Diploma of Financial Planning, Principles of Self Managed Superannuation Funds and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Michael Molloy is a member of Association of Financial Advisers (AFA) and abides by their code of professional conduct and ethics.

## Authorisations

Michael Molloy 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;
- Superannuation;
- Self Managed Superannuation Funds;

## Michael Molloy

Michael Molloy Pty Ltd t/as  
Casey Investment Group

Suite 10, 28-32 Gloucester Avenue  
Berwick VIC 3806

Postal: PO Box 471  
Berwick VIC 3806

Phone: 03 9769 9500

[admin@caseyinvgroup.com.au](mailto:admin@caseyinvgroup.com.au)  
[www.caseyinvgroup.com.au](http://www.caseyinvgroup.com.au)

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## Michael Molloy Pty Ltd Advice Fees and Charges

Michael Molloy 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.

Michael Molloy'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.

Michael Molloy provides the option of ongoing reporting and advisory services. This fee is a % p.a. of the value of your holding or a fixed fee incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Casey Investment Group pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Michael Molloy is a Director of Michael Molloy Pty Ltd t/as Casey Investment Group and will receive a salary/benefit from this company.

## Other Benefits Michael Molloy May Receive

From time to time Michael Molloy 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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Level 1, 607 Bourke Street  
Melbourne Victoria 3000  
1300 306 900  
[www.capstonefp.com.au](http://www.capstonefp.com.au)

This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.