

# Financial Adviser Profile

## Overview

Paul Best is a Director and founder of Revolution Financial Advisers. Paul has over 15 years' experience in the accounting and finance industry both within the UK and Australia. Paul is a qualified accountant having qualified through the Association of Chartered Certified Accountants in the UK.

Paul moved to Australia in 2006 to take up a senior audit position with a big 4 accounting firm in Melbourne before moving to Toowoomba in 2008. Paul was the head of Financial Planning at a prominent Toowoomba accounting firm prior to establishing Revolution Financial Advisers.

Paul's areas of expertise include:

- Savings and wealth creation strategies;
- Investment advice and planning;
- Risk and insurance analysis in order to protect income, families and businesses;
- Self-managed superannuation fund advice;
- Superannuation advice;
- Planning for retirement;
- Salary sacrificing advice.

Paul Best is a Sub-Authorised Representative of Revolution Financial Services Pty Ltd, (t/a Revolution Financial Advisers), Corporate Authorised Representative No. 1250765. Authorised Representative No. 1239786.

## Qualifications

Paul Best holds the following qualifications:

- BA (Hons) Accounting and Finance (Liverpool John Moores University, UK)
- Fellow of the Association of Chartered Certified Accountants (FCCA, UK)
- Member of the Institute of Public Accountants (MIPA)
- Diploma of Financial Planning
- Advance Diploma of Financial Planning

Paul Best meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Paul Best is a member of the below and abides by their respective codes of professional conduct and ethics.

- Fellow of the Association of Chartered Certified Accountants (FCCA, UK)
- Member of the Institute of Public Accountants (MIPA)
- Associate member of the Financial Planning Association (FPA)

## Paul Best

Revolution Financial Advisers

Suite 6  
138 Margaret Street  
Toowoomba QLD 4350

PO Box 812  
Toowoomba QLD 4350

Phone: 07 4632 1174  
Mobile: 0406 936 942

paul@revolutionfa.com.au  
www.revolutionfa.com.au

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## Authorisations

Paul 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; and
- Standard Margin Lending Facility.

## Revolution Financial Advisers Advice Fees and Charges

Paul will be paid by Financial Planning Advice Fees and/or Commissions 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.

Paul’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.

Paul provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

Revolution Financial Advisers pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Paul is a Director of Revolution Financial Advisers and will receive a salary and/or benefits from this company.

## Other Benefits Paul May Receive

From time to time Paul 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 14, 461 Bourke Street  
Melbourne Victoria 3000  
1300 306 900  
[www.capstonefp.com.au](http://www.capstonefp.com.au)

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