

Financial Adviser Profile



Overview

Michael van Loenen started Valley Mayfair Wealth Management in 2012 after returning from the UK. Having previously worked for a holistic financial planning firm in Brisbane and for a private wealth firm in London, Michael wanted to establish his own business offering the best of both worlds - expert investment advice, tailored to each individual client's long term financial goals.

The name Valley Mayfair represents the contrasting locations Michael has worked and lived; Brisbane's Fortitude Valley and London's Mayfair. The two areas couldn't be more different and you need to adjust to their unique characteristics. In the same way, no two clients are the same and we need to adjust to their individual styles, needs and goals.

Michael van Loenen is a Sub-Authorised Representative of Valley Mayfair Pty Ltd, Corporate Authorised Representative No. 460186. Authorised Representative No. 318818.

Qualifications

Michael van Loenen holds a Bachelor of Commerce, majoring in Finance and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Michael van Loenen is a member of the Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Michael van Loenen 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; and
- Securities.



Michael van Loenen

Valley Mayfair Wealth
Management

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Valley Mayfair Wealth Management's Advice Fees and Charges

Michael van Loenen 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 van Loenen's hourly rate for Financial Services is \$440 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

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

Valley Mayfair Wealth Management 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 van Loenen is a Director of Valley Mayfair Wealth Management and will receive a salary/benefit from this company.

Other Benefits Adviser May Receive

From time to time Michael 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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