

Financial Adviser Profile



Overview

John McLellan is a director and founder of BCR Financial Planning. John specialises in providing strategic financial advice to retirees, pre-retirees and wealth accumulators.

John has 40 years' experience in financial services and over 15 years running his own financial planning practice.

John McLellan is a Sub-Authorised Representative of BCR Financial Planning Pty Ltd, Corporate Authorised Representative No.253766. Authorised Representative No.260212.

Qualifications

John McLellan holds a Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

John McLellan is a member of the Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

Authorisations

John McLellan 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; and
- Standard Margin Lending Facility.

John McLellan

BCR Financial Planning Pty Ltd

Unit 403
4 Queen Street
Kings Beach Qld 4551

Postal: PO Box 121
Moffat Beach Qld 4551

Phone: 07 5492 8863
Mobile: 0402 456 380

bcrfp@bigpond.net.au

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BCR Financial Planning - Advice Fees and Charges

John McLellan 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.

John'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.

John provides the option of an ongoing advice service. This fee is negotiable depending on the complexity of the ongoing service. You will be notified of the cost involved prior to the commencement of any ongoing services.

BCR Financial Planning pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. John is a Director of BCR Financial Planning and will receive a salary/benefit from this company.

Other Benefits John May Receive

From time to time John McLellan 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

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.