

ADVISOR PROFILE

TONY CASTELLANO



Banksia Partners Pty Ltd is a company licensed by the Australian Securities and Investments Commission (ASIC) to provide advice in respect to financial products and to deal in financial products on behalf of the firms' clients.

Tony Castellano is an Authorised Representative of Banksia Partners Pty Ltd and has been authorised (ASIC Representative No 333319) to provide financial product advice and deal in all of the below mentioned categories as an employee of Banksia Partners Pty Ltd.

Experience

Tony has over 30 years' experience in banking and financial services including the last 18 years as an advisor. A Certified Financial Advisor CFP® and SMSF Specialist Advisor™, Tony is able to provide clear and concise solutions to complex financial matters and enjoys working closely with his clients to optimise their financial situation.

Prior to joining Banksia Partners Tony had worked as the Practice Principal at Guild Financial Services for 4 years prior to that business being acquired by Partner Wealth Group in 2014, where he remained as a Senior Financial Adviser until his appointment at Banksia Partners.

Authorisations

Tony is authorised to provide advice on, and 'deal' in the following:

- (i) deposit and payment products limited to basic deposit products and products other than basic deposit products
- (ii) debentures, stocks and bonds issued or proposed to be issued by the government;
- (iii) life risk products including:
 - a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
 - b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
- (iv) interest in managed investment schemes including investor directed portfolio services;
- (v) retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997);
- (vi) ASX listed shares & other securities;
- (vii) Standard margin lending facilities, and
- (viii) superannuation;

to retail and wholesale clients.

Qualifications

Tony completed a Diploma in Financial Planning from Deakin University (Dip FP) in 2001 and is an SMSF Specialist Advisor SSA. Tony has passed the

Financial Adviser Standards & Ethics Authorities Financial Adviser Exam effective December 2019.

Professional Membership

Tony is a Member of the Financial Planning Association of Australia (FPA) and is a Certified Financial Planner CFP®, the highest profession designation awarded by the FPA. Tony is also a member of the SMSF Association of Australia.

Fees & Charges

There are various modes of payment for the services we provide. We may either charge a fee directly to you based on an hourly rate, or we may receive fees & commissions directly from product issuers whose products we recommend to you.

Where a 'fee for service' on the basis of an hourly rate is negotiated, the hourly rate is \$275.00 including GST. We may also be paid by a combination of fees and/or hourly rates (paid by you) and commissions (paid by the product issuer). In most instances you will be able to select the mode of payment that suits you best.

Please refer to the Banksia Partners Pty Ltd Financial Services Guide for more detailed information on fees and charges.

Contact

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