Financial Adviser Profile

Emerald Wealth

Overview

Danielle has been in the financial planning industry since 2001. Danielle works closely with her clients on an ongoing basis providing clarity and direction to effectively achieve their goals and dreams. She has an outstanding reputation for providing clients with quality financial advice on appropriate strategies, investments and insurance.

Danielle acknowledges that each and every one of her clients has individual and specific requirements. Some of our clients are already financially successful and simply wish to protect and preserve what they have. Others are seeking to grow their wealth. As a result, each client receives a tailored and unique service designed to ensure that his or her expectations are met and exceeded.

Danielle enjoys being a trusted adviser to her client, their extended networks and families assisting to build a better financial future.

Danielle is a Sub-Authorised Representative of Emerald Wealth Pty Ltd, Corporate Authorised Representative 1257323. Authorised Representative No. 455809.

Special Interests

Danielle, together with her husband lives in the eastern suburbs of Melbourne. She enjoys running, playing netball, home renovating and socialising with friends.

Qualifications

Danielle is a Certified Financial Planner, holds a Diploma and Advanced Diploma in Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Danielle is a member of the Financial Planning Association (FPA) and abides by their code of professional conduct and ethics.

Danielle Bloodworth

Emerald Wealth

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Authorisations

Danielle 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;
- Securities; and
- Standard Margin Lending Facility.

Emerald Wealth Advice Fees and Charges

Danielle may be paid by either 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.

Danielle's hourly rate for Financial Services is $300 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Danielle 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.

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

Other Benefits Danielle May Receive

From time to time Danielle 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.

Capstone FINANCIAL PLANNING

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