

Adviser Profile

Katie Hobbs

Authorised Representative No. 1007893

Bellisle Pty Ltd t/a Monash Group Financial Planners

Corporate Authorised Representative No. 253391

Your adviser

Contact details

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Katie Hobbs

Profile

Monash Group Financial Planners works with Australians to insure their lifestyles through professional planning for each stage of their life. We are a privately owned financial planning practice focused on providing services that help you achieve your personal and business financial goals.

We believe strongly in the benefits of financial planning and insurance solutions for you, your family and your business.

We specialise in areas of:

- Insurance
- Superannuation
- and Financial planning

Bellisle Pty Ltd (trading as Monash Group Financial Planners) is owned by the Hobbs family. The name Bellisle comes from the Hobbs' traditional home of Belle Isle, an island in Ireland's Shannon River. This island home offered peace of mind and security over the centuries to the Hobbs family.

The Monash Group Financial Planners name was inspired by Australian General Sir John Monash. Monash used innovative techniques and modern technology to plan and win major battles during World War I.

At Monash Group Financial Planners we aim to uphold these traditional and inspirational values throughout our business practices.

Katie Hobbs has been individually authorised (Representative Number 1007893) to provide financial product advice and deal in all of the below mentioned categories as an employee of the Monash Group Financial Planners, on behalf of Aon Hewitt Financial Advice Limited.

Experience

Katie started working in the Financial Planning industry in 2006 and joined the family business in 2015. Having worked in Financial Services in Australia and the United Kingdom, this has provided Katie with a depth of experience across the finance sector. Katie works with both individuals and businesses to assist with wealth creation and addressing insurance needs.

Qualifications

Katie holds a Diploma of Financial Services (Financial Planning) and an Advanced Diploma of Financial Planning.

Professional memberships

Katie is a member of the Association of Financial Advisers (AFA).

Authorisations

Australian Financial Services License

Katie is authorised to provide financial product advice and deal in the following:

- i. deposit and payment products limited to:
 - a. basic deposit products;
 - b. deposit products other than basic deposit products;
- ii. life 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;
- iii. securities;
- 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); and
- vi. superannuation.

Fees and charges

Initial consultation

Free of charge

Risk Insurance

Aon Hewitt Financial Advice Limited maybe entitled to receive commissions and other benefits, paid to them by the companies upon placement of policies. We will receive a percentage of these commissions and benefits. Full details of commissions and any other benefits will be disclosed upon recommendation of products.

Investments and Superannuation

Fees for investments and superannuation will generally fall within the range of \$750 to \$3,000 depending on the complexity of your situation and the advice required. Fees may be paid directly by you or deducted from your account balance by the fund manager, as agreed by you. These fees are level, and all adviser commissions are rebated to your account balance. Full details of fees and any other benefits will be disclosed upon recommendation of products.

Review service

We are committed to providing you with ongoing service and advice to ensure that you meet your stated objectives, and as such we will charge you a flat dollar amount dependent on the above-mentioned level of service that you require.

Claims service

As a Monash Group Financial Planners client you will receive a Claims Care Card to personalize with your details. The benefits of your Claims Care Card are Monash Group Financial Planners, Vital Health and I.C.E and Post Claim Care. As a part of our ongoing service, we will not charge you in the event of a claim.

Consulting fees

Where no agreed service arrangement is in place, you will be charged an initial fee of \$500 and an hourly rate of \$295.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Katie is an employee of the Bellisle Pty Ltd (trading as Monash Group Financial Planners) and receives a salary.

The above is a guide only and full details of fees, charges and any other benefits will be disclosed upon recommendation of products.

Note: All fees and charges quoted are inclusive of GST.