

Financial Adviser Profile

Overview

Elena leads the Financial Planning department at Accounting Associates Wealth Creation. With over 10 years' experience in the Financial Services industry, Elena brings together extensive knowledge and skills to best serve her clients' individual needs. She is committed to providing her clients with tailored advice solutions and prides herself on upholding exceptional client relationships.

Elena Skazas is a Sub-Authorised Representative of Accounting Associates Wealth Creation Pty Ltd, Corporate Authorised Representative No. 409817. Authorised Representative No. 1250606.

Qualifications

Elena Skazas holds a Bachelor of Finance (Financial Planning), Diploma of Financial Planning, and Advanced Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

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

Authorisations

Elena Skazas 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;
- Securities; and
- Standard Margin Lending Facility.



Elena Skazas

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Accounting Associates Wealth Creation Pty Ltd Advice Fees and Charges

Elena Skazas 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.

Elena Skazas' 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.

Elena Skazas provides the option of ongoing reporting and advisory services. This fee is either a fixed fee of \$XXX p.a. or XX% 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.

Accounting Associates Wealth Creation Pty Ltd pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Elena Skazas is a salaried employee of Accounting Associates Wealth Creation Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Elena Skazas May Receive

From time to time Elena 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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