Financial Adviser Profile

COXEN
FINANCIAL PLANNING

Overview

Benjamin Coxen began his career in financial planning in 2006 and began providing personal financial advice in 2007. Benjamin established Coxen Financial Planning in 2015, providing comprehensive financial advice with a focus on client education and empowerment.

Benjamin knows the importance of clear and effective communication and benefits from his previous career in education. He takes the time to discover what is important to clients and tailors their individual plan, ensuring goals are realistic and achievable.

Benjamin Coxen is a Sub-Authorised Representative of Coxen Financial Planning Pty Ltd, Corporate Authorised Representative No.1237101. Authorised Representative No. 1009428.

Qualifications

Benjamin holds a Bachelor of Commerce, Bachelor of Applied Science, Graduate Diploma of Financial Planning, is a Certified Financial Planner® and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Benjamin is a member of The Financial Planning Association and abides by their code of professional conduct and ethics.

Authorisations

Benjamin 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; and
- Securities.

Benjamin Coxen
Coxen Financial Planning

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Coxen Financial Planning Advice Fees and Charges

Benjamin 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.

Benjamin'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.

Benjamin provides the option of ongoing reporting and advisory services. This fee is a fixed fee of up to $3,850 p.a varying dependent on the complexity involved plus 0.44% 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.

Coxen Financial Planning 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. Benjamin is a Director of Coxen Financial Planning Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Benjamin May Receive

From time to time Benjamin 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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