Financial Adviser Profile

Overview

After finishing his university studies, Rohan entered the financial services industry in 2005. He has worked for various investment banks and accounting firms throughout his career. His professional experience includes positions at Macquarie Bank, where he worked in Macquarie Private Wealth, NAB's Private Bank, and AXA Rosenberg, a global fund manager, where he was based in London.

Rohan is a highly personable and knowledgeable adviser, committed to gaining a thorough understanding of his clients' circumstances. He provides tailored advice that is appropriate to each client's unique situation. Rohan's exceptional ability to communicate complex financial concepts in a clear and straightforward manner empowers clients to make informed decisions with confidence.

Rohan is a Sub-Authorised Representative of Kalpa Wealth Pty Ltd trading as Kalpa Wealth Management, Corporate Authorised Representative No. 1266313. Authorised Representative No. 1001580.

Qualifications

Rohan is a CERTIFIED FINANCIAL PLANNER® (CFP), and holds a Master of Applied Finance, Bachelor of Commerce, and a Graduate Diploma of Financial Planning. This education enables Rohan to meet the competency requirements under ASIC's Regulatory Guide 146. Rohan is also accredited with a specialist course in Self-Managed Super Funds (SMSF).

Professional Memberships

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

Authorisations

Rohan 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.

Rohan Benstead

Kalpa Wealth Management

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KALPA
WEALTH MANAGEMENT

Kalpa Wealth Management Advice Fees and Charges

Rohan Benstead 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.

Rohan'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.

Rohan 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.

Kalpa Wealth 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. Rohan is a Director of Kalpa Wealth Pty Ltd as trustee for Kalpa Capital Trust, trading as Kalpa Wealth Management and will receive a salary/benefit from this company.

Other Benefits Rohan May Receive

From time to time Rohan 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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