

Adviser Profile

Mahesh Menon

Authorised Representative No. 285409

Insurance Plan Financial Services Pty Ltd

Corporate Authorised Representative No. 1233861

Your adviser

Contact details

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Profile

Mahesh Menon has been individually authorised (Representative Number 285409) to provide financial product advice and deal in all of the below mentioned categories as a Director of Insurance Plan Financial Services Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.

Experience

Mahesh has financial planning experience spanning over a decade, starting his career as a Financial Adviser in 2004 with the Financial Adviser Centre (Westpac) before joining Suncorp Bank in 2007, where he spent eight successful years in the banking channel as a Financial Adviser helping small businesses, families and individual clients with their wealth creation and protection needs.

In August 2015 Mahesh took the opportunity to commence his own practice, Insurance Plan Financial Services Pty Ltd.

Mahesh is dedicated to helping clients prepare for life's most important milestones and achieve their personal and financial goals. He specialises in risk insurance and takes care of clients' personal insurances, such as Life, TPD, Income Protection and Trauma insurance, as well as Business Insurance needs, such as keyperson insurance

Mahesh takes pride in providing sound, honest advice and developing long term client relationships. He provides ongoing service and is fully involved in the claims process when there is a need.

Qualifications and certifications

Bachelor of Arts in Economics

Diploma of Financial Services (Financial Planning) Tribeca

Advanced Diploma of Financial Services (Financial Planning) Kaplan

Authorisations

Australian Financial Services License

Mahesh 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;
- iv. securities;
- v. interest in managed investment schemes including investor directed portfolio services;
- vi. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
- vii. superannuation.

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Date: 23 June 2016 Version: 2.0



Fees and charges

Initial consultation

Free of charge

Advice preparation

Insurance advice: Free of charge

Investment advice: \$600 - \$2,500

The actual fee for the preparation of investment advice will vary depending on the complexity of your situation and the advice required. Prior to you agreeing to proceed with the preparation of a Statement of Advice, the actual fee will be quoted to you.

Implementation

Insurance: Free of charge

Investments: Up to 1.5% of your total investment portfolio

Review service

Insurance: Free of charge

Investments: an ongoing adviser service fee will be calculated as a percentage of your total portfolio to a maximum of 1.5%.

Consulting fees

Insurance: Free of charge

Investments: \$220 - \$440 per hour

Commissions

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

Mahesh Menon is a Director of Insurance Plan Financial Services Pty Ltd and receives a salary and will be entitled to Insurance Plan Financial Services share of the remuneration.

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