

Financial Adviser Profile

Overview

Akriti is a CFP® (Certified Financial Planner) with the Financial Planning Association of Australia with over 12 years of experience in the financial services industry. She has also completed an Accounting Degree and an Advanced Diploma of Financial Planning.

Akriti believes in working closely with clients to develop a tailored and complete solution for their individual needs, guiding them to their desired financial goals and planning for both the foreseeable and unforeseeable along the way.

Akriti Gupta is a Sub-Authorised Representative of ASRA Financial Consulting Pty Ltd, Corporate Authorised Representative No. 1258374. Authorised Representative No. 453782.

Qualifications

Akriti Gupta is a Certified Financial Planner, CFP® and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Akriti Gupta is a member of FPA - Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

Authorisations

Akriti Gupta 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
- Standard Margin Lending Facility.



AKRITI GUPTA

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ASRA Financial Consulting Advice Fees and Charges

Akriti Gupta 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.

Akriti 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.

Akriti 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.

ASRA Financial Consulting pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Akriti is a Director of ASRA Financial Consulting and will receive a salary/benefit from this company.

Other Benefits Akriti May Receive

From time to time Akriti 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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