Financial Adviser Profile

Overview

Lissy has over fifteen years' experience as a Financial Advisor, but at heart she is still a down to earth girl from the Eyre Peninsula. You won't find her in high heels and a suit, but she takes her job seriously and she's on a mission to restore trust to the financial industry. Lissy is generous with her time, takes the honest approach even when it's not easy and fights hard to get the best deal for her clients.

Lissy listens to you so she can understand your unique needs and provide transparent advice to help you make the best choices. She'll provide ongoing support to keep you on track and you can count on her knowledge and experience throughout your financial journey. And because she believes looking after your finances should be as simple as possible, she and her staff can take care of your superannuation, investment, debt management, insurance, and estate planning needs.

At Vestra Wealth, we want to empower you to take control of your finances.
Alicia Wood is a Sub-Authorised Representative of Vestra Wealth Pty Ltd (trading as Vestra Wealth Pty Ltd, Corporate Authorised Representative No. 1258766. Authorised Representative No. 1003550.

Qualifications

Alicia Wood holds a Graduate Diploma of Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Alicia Wood is a member of FPA and abides by their code of professional conduct and ethics.

Authorisations

Alicia Wood 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.

Alicia (Lissy) Wood

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Vestra Wealth Advice Fees and Charges

Alicia Wood 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.

Alicia Wood'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.

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

Other Benefits Alicia Wood May Receive

From time to time, Alicia Wood 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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