



**accura**  
ACCOUNTING AND ADVISORY

# Financial Adviser Profile

## Overview

Hayley is a Chartered Accountant and qualified financial adviser with over 20 years' experience in both retail and Self-Managed Superannuation. Having worked in London and Sydney before settling into her long-term role with Accura, she brings a well-rounded and practical perspective to helping clients navigate the complexities of super.

Hayley has also completed the SPAA Professional Certificate in Self-Managed Superannuation as well as the SAPEPAA qualification for Estate Planning, reflecting her commitment to staying up to date in an ever-changing industry. She genuinely enjoys building long-term relationships with her clients and helping them feel confident about their financial future – guiding them with clear, thoughtful advice to make the most of their super during their working years and into retirement.

Hayley Matcham is a Sub-Authorised Representative of Accura Superannuation Advice Pty Ltd, Corporate Authorised Representative No. 1259614. Authorised Representative No. 1259613.

## Qualifications

Hayley Matcham holds a Diploma of Financial Planning; Bachelor of Business; Professional Certificate in Self-Managed Superannuation Funds and meets the competency requirements under ASICs Regulatory Guide RG 146.

## Professional Memberships

Hayley Matcham is a member of the Institute of Chartered Accountants Australia and abides by their code of professional conduct and ethics.

## Authorisations

Hayley Matcham is authorised to:

- provide financial product advice on self managed superannuation funds
- arrange to deal in an interest in a self managed superannuation fund
- provide financial product advice on superannuation products in relation to a person's existing holding in a superannuation product but only to the extent required for
  - making a recommendation that the person establish a self managed superannuation fund; or
  - providing advice to the person on contributions or pensions under a superannuation product
- provide class of product advice on the following:
  - superannuation products
  - securities
  - simple managed investment schemes
  - life risk insurance products
  - non-basic deposit products.



### Hayley Matcham

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## Accura Superannuation Advice Fees and charges

Accura Superannuation Advice Pty Ltd will be paid Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you before it is charged.

Accura Superannuation Advice Pty Ltd's fee for the preparation of a Statement of Advice (SoA) and other documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$2,200 and \$2,750 incl GST.

Accura Superannuation Advice 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 clients.

Hayley Matcham is an authorised representative of Accura Superannuation Advice Pty Ltd, a Corporate Authorised Representative of Capstone Financial Planning Pty Ltd. Hayley is a salaried employee of Accura Pty Ltd t/as Accura Accounting and Advisory, a related entity of Accura Superannuation Advice Pty Ltd, Hayley does not receive commissions. Accura Superannuation Advice Pty Ltd may pay service fees to related entities within the Accura group, including Accura Pty Ltd t/as Accura Accounting and Advisory, for administrative, professional and support services.

## Other Benefits Hayley May Receive

From time to time Hayley 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.