

# Financial Adviser Profile

Mark Candy

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**MARK CANDY ("Mark")**

*Is Financial Adviser No. 467779 and Sub Authorised Representative of*

**VOGUE ADVISORY GROUP PTY LTD ("Vogue")**

*Corporate Authorised Representative (No. 1261760) of*

**LIFESTYLE ASSET MANAGEMENT PTY LTD, ("LAM")**

*a privately owned holder of Australian Financial Services Licence 288421*

**This Adviser Profile and the Financial Services Guide of Vogue Advisory Group must be read together to give full understanding of services offered.**

## Who is Vogue Advisory Group?

Vogue Advisory Group Pty Ltd (ABN: 65 624 229 867) ("Vogue") is an Authorised Representative (AFS number 1261760) of Lifestyle Asset Management Pty Ltd (LAM), holder of Australian Financial Services Licensee number 288421.

## Who is my financial adviser?

Your financial adviser is:

**Mark Candy** Financial Adviser Number 467779  
 Address: Suite 23, Level 2, "Riverwalk Place"  
 238 Robina Town Centre Drive, (Cnr Laver Dr)  
 ROBINA QLD 4227  
 Postal: PO Box 478 Varsity Lakes QLD 4227  
 Telephone: 1300 709 985  
 Email: [mark@vogue-fs.com.au](mailto:mark@vogue-fs.com.au)

## What experience does my adviser have?

Mark Candy has over 25 years' experience in the financial services industry. He has held senior management positions with some of Australia's leading financial services organisations and has worked for several wealth management firms holding both directorships and Responsible Manager roles.

## Qualification and Professional Memberships:

### Mark has completed the following courses of study:

- Diploma of Financial Planning (RG146)
- Responsible Managers Course (RG105)
- Master of Management
- Bachelor of Business (Banking and Finance)
- Diploma in Financial Markets
- Trust Administration III
- Certificate Course-Securities Institute of Australia

Completed the industry Financial Adviser exam and is registered as a tax (financial) adviser.

### Mark Candy is a member of the following professional bodies:

- Financial Advice Association Australia – Advice Practitioner
- Financial Services Institute of Australasia – Fellow
- Institute of Managers and Leaders – Fellow

## Who is responsible for the financial services provided?

Mark provides advice on behalf of Vogue under authorisation from LAM to provide financial advice to wholesale and retail clients,

## What kinds of financial services is Mark authorised to provide to me and what kinds of financial products do these services relate to?

Mark is authorised to provide financial product advice and deal in the following financial products:

- Deposit and payment products limited to:
  - Basic deposit products
  - Debentures, stocks or bonds issued or proposed to be issued by a government.
- Life products including:
  - Investment life insurance products
  - Life risk insurance products
- Interests in managed investment schemes including investor directed portfolio services.
- Retirement savings accounts products
- Securities
- Superannuation

Mark also provides an advice review service. As part of this service, Mark will conduct a review of your current personal financial situation, goals, needs and any previous advice provided, and recommend changes where they are needed.

## How do we charge our clients for our services?

This FSG has previously outlined the source, method and amount of remuneration and other benefits payable to your adviser for the services provided to you.

Payments of fees for initial advice, ongoing service and commissions from new life insurances written will generally be made by the investment platform and insurance providers to the licensee, LAM.

- LAM does not retain any direct share of revenue from client activities, which LAM passes on to Vogue. LAM receives from Vogue a fixed monthly fee for its services as licensee.
- Mark receives a salary from Vogue, which is not related to revenue received. The only direct share of revenue that Mark receives is payment of up to 10% of upfront commissions for new policies paid to Vogue by insurance providers.

## Will anyone be paid to refer me to my Adviser?

From time to time an accountant or other external entity may be paid for making referrals to Vogue or Mark. The amount paid is not ascertainable; however, where any amount is payable, it will be fully disclosed in the 'Statement of Advice' (SoA) or any other advice document provided to you.

## Further questions?

If you have any further questions about the services LAM provides, please contact the Compliance Manager at [erm@lifestyleam.com.au](mailto:erm@lifestyleam.com.au) or on 1300 226 271.

You should retain this FSG and Adviser Profile for your reference and any future dealings with Mark Candy, Vogue Advisory Group Pty Ltd or Lifestyle Asset Management.

### Conflicts of Interest

- Aside from the commissions we receive from insurers, Vogue and Mark do not have any other relationships that may create a conflict of interest or potentially influence our advice to you.
- We are not associated with any product recommended. LAM may receive financial assistance from product providers to assist with the provision of ongoing education to our advisers, but this is in no way related to the distribution of any particular product.

### The financial services are offered to you by Mark as a representative of Vogue under LAM's AFSL 288421.

LIFESTYLE ASSET MANAGEMENT PTY LTD

ABN No: 58 113 067 968

AFSL No: 288421

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