



Financial Adviser Profile

Overview

Trust plays a huge role in financial services and this is one key attribute that Steven holds closely to his heart. The moment you meet Steven, there is an earnest nature about him. Steven lives by a set of core values which are defined by empathy for others, positivity as well as a strong thirst for knowledge and education.

Advice Street's Principal Adviser Steven Hastie has worked in wealth management and advice since 2013. He earned the award Adviser of the Year 2020 at MLC Advice. Employing an easy-going approach, he focuses on streamlining his clients' affairs and helping them make sense of financial concepts.

Advice Street specialises in helping clients grow, protect and transfer wealth. We focus on comprehensive financial planning. We are well versed in strategic debt management, cashflow, budgeting and portfolio construction for accumulators, as well as pre- and post-retirees. Advice Street also provide advice on insurance, investments and superannuation assisting a wide variety of clients to achieve their financial goals. Paramount to all of our advice is tax planning as well as the implications and importance of correct structuring. We also work with small to medium enterprises in a financial advice capacity.

Steven believes that every client has unique financial goals and will work closely with clients to develop a plan for achieving them. This ensures that their long-term financial strategies are supported by an equally long-term relation.

Steven Hastie is a Sub-Authorised Representative of Advice Street Pty Ltd, Corporate Authorised Representative No.1286200. Authorised Representative No.472126.

Qualifications

- Certified Financial Planner (CFP)
- Bachelor of Business (Real Estate)
- Bachelor of Commerce (Finance)
- Diploma of Financial Planning



Steven Hastie

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Authorisations

Steven Hastie 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
- Securities

Advice Street Fees and Charges

Steven’s hourly rate for Financial Services is \$440 per hour incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable. Steven’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.

Steven provides the option of ongoing reporting, consulting and advisory services. This fee is a fixed fee depending on the work involved incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Advice Street pays a fixed licensing fee to Adviser Services Hub Pty Ltd and will receive all revenue earned from the financial services provided to you. Steven is a Director & salaried employee of Advice Street and will receive a salary/benefit from this company.

Other Benefits Steven May Receive

From time to time Steven 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.

Adviser Services Hub

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