

Financial Adviser Profile



Overview

Damien established Butler Private in 2019 to reflect his passion for providing high-quality, ethical advice, and a desire to provide fully integrated financial solutions to the clients of his Accounting Practice Butler Pty Ltd Chartered Accountants.

Damien has been the Director of Butler CA since 2000, and prior to that worked as a Tax Consultant with DBA Lawyers. Damien studied a Bachelors' Degree in Agricultural Science before he transitioned to a career in finance with postgraduate studies including a Graduate Diploma in Accounting and a Diploma of Financial Planning. He is a Chartered Accountant, Chartered Taxation Advisor, and CA Accredited SMSF Specialist.

Damien Butler is a Sub-Authorised Representative of Butler Private Pty Ltd, Corporate Authorised Representative No. 1272253. Authorised Representative No. 1249971.

Qualifications

Damien holds a Bachelor of Agricultural Science, a Graduate Diploma in Accounting, and a Diploma of Financial Planning; and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Damien Butler is a member of Chartered Accountants Australia and New Zealand (CA ANZ), Member of NTAA, and a fellow of Taxation Institute of Australia – Chartered Taxation Adviser.

Authorisations

Damien 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;
- Securities; and
- Margin Lending.



Damien Butler

Butler Private Pty Ltd

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Butler Private Pty Ltd Advice Fees and Charges

Damien 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.

Damien'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.

Damien 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.

Butler Private 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 you. Damien is a Director of Butler Private Pty Ltd, Butler Pty Ltd, and AB Insurance Solutions Pty Ltd and will receive a benefit from these companies.

Other Benefits Damien May Receive

From time-to-time Damien 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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This Adviser Profile has been authorised for distribution by Capstone Financial Planning Pty Ltd. AFSL No. 223135. This Adviser Profile forms part of the Financial Services Guide (FSG) and is to be read in conjunction with the FSG.