Luka Financial Pty Ltd
FINANCIAL ADVISERS
...making it easy!

Luka Group & its associated businesses can help you with:
Accounting & Tax
Business Advice
Auditing
Financial Advice
Life & Income Insurance
Mortgage Broking & Finance

Financial Adviser Profile

Overview

Nicholas has been in the industry for over 3 years working in various roles, he has made it his mission to deliver professional holistic advice to his clients and community. With a broad range of skills, he is able to provide holistic advice encompassing all of a client's position from investment advice to debt reduction strategies and Self-Managed Super Funds.

Luka Financial is part of the broader Luka Group, this provides them access to the wealth of knowledge held by the greater group. Luka Group prides itself on being able to deliver all aspects of our client's financial needs in a professional, ethical and client focused manner.

Nicholas McKenna is a Sub-Authorised Representative of Luka Financial Pty Limited, Corporate Authorised Representative No. 441690. Authorised Representative No. 1254009.

Qualifications

Nicholas McKenna holds a Bachelor of Accounting and Finance and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Nicholas McKenna is a member of Financial Planning Association of Australia (FPA) and is a registered Tax (Financial) Adviser with the Tax Practitioners Board (TPB) and abides by their codes of professional conduct and ethics.

Authorisations

Nicholas McKenna 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.

Nicholas McKenna

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Financial Adviser Profile

Luka Financial Advice Fees and Charges

Nicholas McKenna 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.

Nicholas's hourly rate for Financial Services is $220 incl. GST and you will be notified of the time involved prior to the commencement of any work if applicable.

Nicholas'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.

Nicholas provides the option of ongoing reporting and advisory services. This fee is a fixed fee or percentage (%) of the value of your holding. You will be notified of the cost involved prior to the commencement of any ongoing services.

Luka Financial Pty Limited pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Nicholas is a salaried employee of Luka Financial Pty Limited and will receive a salary/benefit from this company.

Other Benefits Nicholas May Receive

From time to time Nicholas 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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