



ARGENT STREET

# Financial Adviser Profile

## Overview

Argent Street was founded in 2009 by Jeff Yacoub after being disheartened by the approach traditional financial planning firms were taking with the process of looking after their clients.

Jeff is Argent Street's Managing Director with over 19 years of experience providing strategic and financial advice to corporate and private clients. Jeff is extremely knowledgeable on all aspects of financial planning and communicates with clients in straightforward, uncomplicated language.

Jeff is very active in the financial services industry. As a member of the Financial Advice Association Australia (FAAA) and the SMSF Association, he is frequently called on to present on financial matters.

Jeff Yacoub is a Sub-Authorised Representative of Argent Street Pty Ltd, Corporate Authorised Representative No. 453150. Authorised Representative No. 312920.

## Qualifications

Jeff Yacoub holds a Bachelor of Management, a Diploma of Financial Services (Financial Planning), a Graduate Diploma in Financial Planning and is a Certified Financial Planner; and meets the competency requirements under ASIC's Regulatory Guide RG 146.

## Professional Memberships

Jeff Yacoub is a member of the Financial Advice Association Australia (FAAA) and abides by their code of professional conduct and ethics.

## Authorisations

Jeff Yacoub 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.



**Jeff Yacoub**

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## Argent Street Advice Fees and Charges

Jeff Yacoub 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.

Jeff's fee for the preparation of a Statement of Advice (SoA) and other Advice documents will vary depending on the complexity involved and the time taken. The SoA fee is typically between \$3,500 and \$9,000 incl. GST.

Jeff provides the option of ongoing reporting and advisory services. This is generally a fixed fee, typically between \$4,000 and \$12,000 incl. GST.

Argent Street pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Jeff is a Director of Argent Street and will receive a salary/benefit from this company.

## Other Benefits Jeff May Receive

From time to time Jeff 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.