

Adviser profile for Robert Stark CFP



Robert Stark CFP AR 239489 of Core Financial Services Pty Ltd AFSL 480009

Robert is the Proprietor of Self Managed Retirement Systems Pty Ltd. which is a Corporate Authorised Representative of Core Financial Services Pty Ltd. ABN 91 607 163 646 The Authorised Representative Number for Self Managed Retirement Systems is 240331.

Educational qualifications and experience

I joined the financial services industry in 1970 initially in Estate Planning until 1987, when I became involved in SMSF strategies. On 17 Oct 1991 Self Managed Retirement Systems Pty Ltd (SMRS) was established to provide compliance and strategic advice to SMSF Trustees, particularly in the area of in-specie transfers of business real property to SMSF's.

In September 2002, I completed a Diploma of Financial Planning and hold the internationally recognised Certified Financial Planner™ or CFP® qualification. SMRS is a Founding Member of SISFA (Self-managed Independent Superannuation Funds Association) and I have been SISFA's WA Director since 1999.

Products offered

I am authorised to provide financial product advice to my clients and deal in:

- Investments (Shares, Hybrids, Cash and Managed Investments)
- Superannuation (including SMSF's)
- Life Insurances and other Risk Insurances
- Retirement Planning

The services I am able to offer to my clients are:

- Superannuation advice, including salary sacrifice and consolidation strategies
- Personal insurance strategies
- Investment strategies
- Retirement planning advice
- Estate planning advice
- Advice on ownership and structures eg. Self Managed Superannuation, strategies and compliance to SMSF Trustees
- Ongoing advisory services
- Referrals to specialists eg. accountants, solicitors SMSF Administrators
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Remuneration

There are various ways that you may pay for the services that are provided.

Fee for Service

The fee for service may be determined by any of the following:

1. an hourly rate of \$330 per hour (including GST) depending on the complexity of your circumstances
2. an agreed fee
3. SMSF fees are agreed on the estimated work involved and can be adjusted with the Trustees agreement in writing.

If you pay a fee for service to Core Financial Services they will pay 100% of these fees to my Practice . I will disclose, at the time I provide you advice, the amounts that the Practice receive as a result of providing a financial service.

Contact details

If you would like to make an appointment, please contact my office on:

Phone: (08) 9381 4444

Fax: (08) 9380 4051

Email : rstark@smrspl.com.au

Address: 37 Blythe Ave YOKINE WA 6060

