Our Financial Advisers

This document is the Adviser Profile of the Financial Services Guide (FSG). The FSG is not complete without it.

Jason Rees

Financial Adviser

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I am sub-authorised to provide the financial services described in the FSG by Elements Financial Planning Pty Ltd ('Elements'), Authorised Representative number 000421682, which is a Corporate Authorised Representative of Spark Advisors Australia Pty Ltd ABN 34 122 486 935 AFSL 380552.

Not Independent

I am not able to describe myself as being independent, impartial or unbiased because:

- I receive commission on life insurance products as explained in this FSG under the heading 'How we are paid'.
- I have an approved product list which limits the range of products I can recommend when providing advice to you; and
- Our Licensee is a wholly owned subsidiary of Spark Partnership Group Holdings Pty Ltd ("Spark Partnership Group"). Aura Group Pty Ltd, a shareholder in Spark Partnership Group, wholly owns Aura Funds Management Pty Ltd ("AFM") and is a provider of wholesale managed funds which may be included in our Approved Product List.
- Our Licensee is a wholly owned subsidiary of Spark Partnership Group Holdings Pty Ltd ('Spark Partnership Group'), which also owns Spark Asset Management Pty Ltd ('Spark AM'). Spark AM is an investment manager for some Managed Portfolios and receives a fee in respect of this activity. Our Licensee is a promoter of these Managed Portfolios which are included in our Approved Product List.

Experience, Qualifications and Professional Memberships

Having begun my career working for Elements Financial Planning in 2020, I have worked my way through various roles to gain a total understanding of the importance of each role in the advice process. Together with David, I have dedicated myself to providing the best possible service to our clients ensuring continued success.

I hold a Bachelor of Commerce (majoring in Accounting & Financial Planning) with a minor in Economics.

My Associations or Relationships

I have an association with Elements as an employee. Fees and commissions are paid to Elements by Spark Advisors for distribution to me.

Product and Service Advice Offered

I am authorised to provide financial services, including advice or services in the following areas:

- Budgeting
- Centrelink Entitlements
- Investment Advisory
- Debt Management
- Estate Planning
- Financial Planning
- Personal Insurance
- Portfolio Review
- Retirement Planning
- Superannuation
- Tax Strategies
- Wealth Management

I am authorised to provide financial product advice and deal in the following financial products to both retail and wholesale clients:

- deposit and payment products
- debentures, stocks and bonds
- life products including investment life insurance and life risk insurance
- managed investments (including investor directed portfolio services (IDPS))
- retirement savings accounts (RSA)
- securities and
- superannuation

I am not authorised to provide financial product advice or deal in the following financial products:

- direct equities
- standard margin lending
- self-managed superannuation funds

I am a qualified tax relevant provider and can provide tax (financial) advice services to retail clients.

Please ask me if you would like a referral for any other services.

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