Financial Adviser Profile

Overview

Geoff Hickman has over 25 years' experience in the financial planning industry. He began in 1994 when he joined Jim Hickman Financial Services (JHFS) - founded by his father Jim in 1982 after working in the insurance and superannuation industry for 30 years. Geoff was Jim's succession plan to ensure Jim's clients would be cared for after his retirement. After Jim's retirement in 2007 Hickman & Ritchard Financial Planning (HRFP) was formed with his now business partner, Shaun Trimnell-Ritchard. Geoff enjoys long-term relationships with his clients by building their financial security and helping to create the lifestyle they want. Geoff's in-depth knowledge of the finance industry and background in accounting will help you clarify where you are now, where you want to go, and how to get there. Geoff will help you set immediate, medium, and long-term goals and then implement a plan to help you reach those goals.

Geoff Hickman is a Sub-Authorised Representative of Jim Hickman Financial Services Pty. Limited trading as Hickman & Ritchard Financial Planning, Corporate Authorised Representative No. 243126. Authorised Representative No. 242926.

Qualifications

Geoff Hickman holds a Bachelor of Arts majoring In Accounting and a Diploma in Financial Planning and meets the competency requirements under ASIC's Regulatory Guide RG 146.

Professional Memberships

Geoff Hickman is a Certified Financial Planning (CFP) member of the Financial Planning Association of Australia and abides by their code of professional conduct and ethics.

Authorisations

Geoff Hickman 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; and
- Securities.

Geoff Hickman

Hickman & Ritchard
Financial Planning

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Jim Hickman Financial Service Pty Ltd Advice Fees and Charges

Geoff Hickman 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.

Geoff'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.

Geoff provides the option of ongoing reporting and advisory services. This fee can be either a fixed fee or a percentage fee based on the value of your holdings incl. GST. You will be notified of the cost involved prior to the commencement of any ongoing services.

Jim Hickman Financial Services 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. Geoff is a Director of Jim Hickman Financial Services Pty Ltd and will receive a salary/benefit from this company.

Other Benefits Geoff Hickman May Receive

From time to time Geoff 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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