

Adviser Profile



Lachlan Mahon, CFP, BCom (Eco, Fin, Fin P)
Arco Advisory Pty Ltd ACN 611 460 523



FPA AGED CARE SPECIALIST
FINANCIAL PLANNING ASSOCIATION of AUSTRALIA



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

ADDRESS

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The Adviser Profile forms an essential part of the Financial Services Guide ("Guide"). The Guide is not complete without it.

Authorised Representative Number: 1003208
Corporate Authorised Representative Number: 1292715
Issued: 01/09/2021
Version: 1.10

Arco Advisory Pty Ltd trading as Arco Advisory (Practice) is providing advice and other financial services to you as an Authorised Representative of Arco Financial Services Pty Limited (AFSL No. 530960 ABN 73 649 341 033) (Arco Financial Services).

Lachlan Mahon is an Authorised Representative of Arco Financial Services.

I commenced my career in Financial Planning in 2013 at Westpac. My technical skills and ability to interact with clients led to significant career advancement and promotions.

I have completed a Bachelor of Commerce majoring in Economics, Finance and Financial Planning, the Certified Financial Planner's designation, Advanced Diploma in Financial Planning, and further qualifications in Self-Managed Super Funds, Aged Care, Mortgage Broking and Derivatives.

Over the years, my interactions with clients have highlighted the importance of strong relationships, ensuring I gain a true understanding of my client's objectives, requirements and expectations. I am a relationship driven advisor who regards my honesty, loyalty and technical expertise among my greatest attributes in achieving these outcomes.

My areas of expertise are developing strategic approaches to superannuation, investment growth, and protection of assets. This expertise, coupled with the team-based approach at Arco ensures that I am able to continually provide optimal outcomes for my clients.

AREAS OF ADVICE

Lachlan Mahon is authorised to provide services covering advice and dealing in financial products in the specialised areas listed below:

- Life Risk Insurance Products
- Risk Insurance within Superannuation
- Deposit and Payment Products
- Interests in Managed Investment Schemes
- Superannuation
- Retirement Saving Accounts
- Approved Deposit Funds
- Traditional Annuities and Pensions
- Market-linked Annuities and Pensions
- Investment Life Insurance Products
- Standard Margin Lending Facilities
- Business insurance
- Estate Planning
- Self Managed Superannuation Funds
- A range of approved ASX listed investments managed under a model portfolio
- Gearing/Margin Lending
- Aged Care

REMUNERATION

I may be remunerated by one or more of the following methods outlined below. If any remuneration I receive relates to the advice provided to you, then further details will be set out in your Advice Document.

Fee for service

As an Authorised Representative of Arco Financial Services, all fees for the provision of financial services by the Practice are paid directly by you to Arco Financial Services, who will then pass on that fee, less an agreed amount (the Licensee Fee) to the Practice.

The Licensee fee the Practice pays Arco Financial Services will range between \$0 and \$70,000 (exc. GST) per annum.

I will disclose, at the time I provide you with advice, the amounts that Arco Financial Services receives (that is, the Licensee Fee), as well as the amounts the Practice and I may each receive as a result of providing a financial service to you.

Remuneration from product and service providers

Arco Financial Services may receive remuneration from product and service providers who in turn may pay a proportion of this to Practices as detailed in The Guide under the heading 'How we are paid'. I will disclose, at the time I provide you advice, the amounts that Arco Financial Services, the Practice and I may each receive (if any) as a result of providing a financial service to you.

As outlined above, at the time we provide advice to you, I will disclose any remuneration that Arco Financial Services, the Practice and I may each receive from product and service providers as a result of providing a financial service to you.

Salary

I am/may be paid a salary based on experience and capability.

Bonus

I may be eligible to receive a bonus, based on a combination of revenue and other non-financial measures that relate to compliance, staff training and the quality of service.

Other benefits

I may also receive other benefits, all of which are detailed in The Guide under the heading "What else you need to know".

CLIENT FEES

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

Fee for Service

A fee for service may be payable for the following services:

- preparation of advice and implementation
- initial advice
- ongoing review and advice services

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

1. an hourly rate that we agree depending on the complexity of your circumstances
2. a fee that we agree with you before we commence work
3. a percentage of funds under advice depending on the complexity of your circumstances
4. a combination of any of the above.

A combination of Fee for Service and Remuneration from a Product or Service Provider

A combination of fee for service and remuneration from a product or service provider may be payable. This will be disclosed to you at the time we provide you with advice.

I will obtain your agreement to the arrangement prior to proceeding.

In the unusual situation where you require further advice and I am unable to assist you due to being absent for a short period (for example, on annual or sick leave), one of my colleagues, who is also an authorised representative of Arco Financial Services, will instead assist you.