Adviser profile

Michael Molloy

Authorised Representative No. 237795

Michael Molloy Pty Ltd trading as Casey Investment Group

Corporate Authorised Representative No. 237212

Your adviser

Contact details

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Profile

Michael Molloy has been operating since 1988 and specializes in superannuation and risk insurance.

Michael Molloy has been individually authorised (Representative Number 237795) to provide financial product advice and deal in all of the below mentioned categories as a Director of Michael Molloy Pty Ltd on behalf of Aon Hewitt Financial Advice Limited.

Qualifications

Michael holds a Diploma of Financial Planning, an Advanced Diploma of Financial Planning and is a member of the Association of Financial Advisers (AFA).

Authorisations

Australian Financial Services License

Michael is authorised to provide financial product advice and deal in the following:

i. deposit and payment products limited to:
   a. basic deposit products;
   b. deposit products other than basic deposit products;
ii. life products including:
   a. investment life insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds; and
   b. life risk insurance products as well as any products issued by a Registered Life Insurance Company that are backed by one or more of its statutory funds;
iii. securities;
iv. interest in managed investment schemes including investor directed portfolio services;
v. retirement savings accounts ("RSA") products (within the meaning of the Retirement Savings Account Act 1997); and
vi. superannuation.

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Fees and charges

Initial consultation

Free of charge

Advice preparation

Completion of needs analysis: Free

Advice preparation: The actual fee for the preparation of advice will vary depending on the complexity of your situation and the advice required.

In most cases it will be nil as we are remunerated by the Insurance Company we place the business with, but if we do charge you for advice preparation in the form of a Statement of Advice, the actual fee will be quoted to you before proceeding, and signed off by you as acceptance of this fee.

Implementation

Up to 3.3% of the sum invested as detailed in the Statement of Advice.

This fee may be paid from the investment product. The actual fee will be stated in the Statement of Advice and agreed with you prior to the placement of your investments.

Review service

A minimum ongoing service fee will be calculated as a percentage of your total portfolio to a maximum of 1.1%.

Consulting fees

$250 per hour

For any other service you require that is not specified above, we will charge you at the above hourly rate.

Commissions

Refer to the Financial Services and Credit Guide for a detailed explanation of commissions that may be paid by product issuer(s).

Note: All fees and charges quoted are inclusive of GST.