



Adviser Profile

This Adviser Profile is part of the Hartmann Planning's FSG

Who will be providing the financial service to me?

Tim Hartmann is an Authorised Representative of Hartmann Planning Pty Ltd. (AFSL – 460458)

Tim is also the sole director and owner of Hartmann Planning Pty Ltd.

Hartmann Planning Pty Ltd is the legal entity which is responsible for any advice given.

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Website

www.hartmannplanning.com.au

Who is my adviser?

Your adviser is Tim Hartmann, an Authorised Representative (Number 312161) of Hartmann Planning Pty Ltd and is the Director of Hartmann Planning Pty Ltd.

Tim can provide the same financial services as stated in the attached FSG.

Tim has been a financial planner since 2007. Tim had been an authorised representative of a large national dealer group as well as boutique financial planning company. In 2014, Tim decided that he would apply for his own Australian Financial Services Licence (AFSL). This has enabled Tim to maintain client focused advice that is only in the best interest of his clients.



Starting without a single client, Tim has built Hartmann Planning Pty Ltd with the determination to be independently owned, therefore giving his investors advice that is impartial, objective, and essentially, conflict free. This means that his loyalty is to you.

Tim believes very strongly in following the evidence where it leads, regardless of dogmas, agendas and self-interest.

Tim maintains an intimate ongoing relationship with each of his clients so they get all the care and support they need to achieve what is important to them.

Tim's objective is to help his clients make smart decisions with their money so they can achieve financial security. He always listens to his client's issues, and takes the time to understand his client's needs, concerns and values.

Tim's individual approach to making a real difference in the financial services industry, has earned him the trust of over 700 clients nationwide.

He has also been recognised as one of Australia's Top 50 Financial Advisers as voted by 'Wealth Professional Magazine' (No 17)

Tim's mission is to provide a 1 on 1, personalised, first class service with a holistic approach to each client's needs with honour, passion and integrity.

Professional Details

Job Title:

Adviser – Hartmann Planning Pty Ltd

Job Role:

Financial Planner / Director

Duties:

Tim is an expert in superannuation advice, self-managed superannuation funds (SMSFs), retirement planning, life and income protection insurances, risk assessment and management, investment strategy and advice, wealth creation, tax planning, estate planning, cash flow analysis and budgeting, debt management advice, portfolio monitoring and reviews



Financial Services Education

Diploma of Financial Planning

Advanced Diploma of Financial Planning

Self-Managed Super Funds Accreditation

Ongoing professional education accordance with ASIC's Regulations.

The Financial Planning Process

I recognise that the objectives and personal circumstances of each client are different.

What is right for one client may not be right for another.

I listen to you to understand your needs, concerns and values. I ask questions to make sure I address all issues.

When I provide advice to you, it will be explained thoroughly and documented in a Statement of Advice (SoA).

If a financial product is recommended to you I will also provide you with a Product Disclosure Statement (PDS). This will help you to understand the product I am recommending.

At all times you are able to contact me and ask questions about the advice and products recommended.

Once I have helped you to put your financial advice in place, I provide ongoing advice services.

These keep your advice up to date for changes in your circumstances, changes in the law and changes in the economy and products available.

How is your adviser remunerated?

Hartmann Planning pays Tim Hartmann 100% of any fees or commissions Tim generates.