

Financial Adviser Profile



FINANCIAL BALANCE
GROUP
TRUST - RESPECT - COMPETENCE - CARE

Overview

Ilya has over 10 years of experience in the financial planning profession.

Ilya loves providing advice and helping clients achieve their goals and supporting them on their financial journey. Backed with his academic knowledge, experience and input from world's leading research house, he is well placed to find solutions and strategies tailored to individual needs.

More importantly than his academic record and strong technical knowledge, Ilya's natural empathy enables him to listen and understand his clients' real needs, ensuring that advice they receive is in their best interest.

Ilya loves maintaining long-term relationships to see his clients achieve their life and financial goals. He has personal experience that demonstrates what can be achieved with sound financial planning. His professional interests include retirement planning, investments, social security, estate planning and aged care.

Outside of work Ilya enjoys spending time with his family, travelling, working on DIY home projects and staying fit.

Ilya Egorov is a Sub-Authorised Representative of Financial Balance Group Pty Ltd, Corporate Authorised Representative No. 1296824. Authorised Representative No. 1001027.

Qualifications

Ilya has attained the internationally recognised CERTIFIED FINANCIAL PLANNER® designation. He also holds the following qualifications:

- Bachelor of Economics
- Master of Accounting and Financial Management
- Diploma in Financial Services (Financial Planning)
- Graduate Diploma in Financial Planning
- SMSF accreditation
- Accredited Aged Care Professional™

Ilya is FASEA accredited and meets the competency requirements under ASICs Regulatory Guide RG 146.

Professional Memberships

Ilya Egorov is a member of the Financial Advice Association of Australia and abides by their code of professional conduct and ethics.



Ilya Egorov

Financial Balance Group

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Authorisations

Ilya Egorov 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
- Self Managed Superannuation Funds
- Securities.

Financial Balance Group Advice Fees and Charges

Ilya Egorov 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.

Ilya'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.

Ilya provides the option of ongoing reporting and advisory services. You will be notified of the cost involved prior to the commencement of any ongoing services.

Financial Balance Group 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. Ilya Egorov is a Director of Financial Balance Group Pty Ltd. and will receive a salary/benefit from this company.

Other Benefits Ilya Egorov May Receive

From time to time Ilya Egorov 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.



The Association
of Age Service
Professionals
Accredited Member



Version 4.7



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