



Adviser Profile

Jonathan Blake

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Jonathan has been a partner a Crispin & Jeffery since 1996, having joined the firm in 1990. Prior to that he worked with KPMG. He focuses on working with individuals and small businesses in addressing their taxation and business management affairs over a broad range of professions and industries.

Jonathan has an in depth knowledge and experience with Self Managed Super Funds. He is able to assist his clients with strategic advice.

Jonathan charges an hourly rate on the basis of the time required to prepare your advice. The hourly rate is between \$330 - \$495 including GST. He is a partner at Crispin & Jeffery and is entitled to receive distributions as per his interest in the partnership.

Qualifications & Designations

- Bachelor of Economics from Sydney University
- Kaplan Professional Education Course for Accountants in Self Managed Superannuation Funds
- Associate Member of Chartered Accountants Australia & New Zealand
- Justice of the Peace NSW

Advisory services

Primestock's financial services are personalised to our clients' needs. We can provide a total financial solution, or alternatively advice can be limited to a particular service or situation, including:

- Financial & Retirement Planning
 - Wealth Creation, Accumulation & Consolidation
 - Retirement Planning Strategies
- Investment Advice
- Life Insurance
- Self Managed Superannuation Fund (SMSF) & Superannuation Advice
- Wills & Estate Planning
- Business Succession Planning
- Asset Protection
- Lending & Finance

Ensuring you have the right Structure and Strategies in place to meet your financial objectives for a secure future.

Jonathan is authorised to advise on the following areas relating to SMSFs:

- Establishment of an SMSF including advice on type of trustees;
- Provision of a General Asset Class Investment Strategy;
- Contributions including proceeds from the sale of business;
- Pension (Transition to Retirement and Account Based);
- Limited Recourse Borrowing Arrangement Structuring;
- Acquiring (purchasing) an asset from a related party in respect to merely considering whether it is allowed under superannuation rules; and
- Winding up an SMSF.

The financial advisory services referred to in this profile are offered by Jonathan Blake, Authorised Representative No. 1243943, on behalf of Primestock Securities Ltd (Primestock), Australian Financial Services Licence No. 239180.

The Financial Services that Ben offers are provided by: **PRIMESTOCK SECURITIES LTD**

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