Financial Adviser Profile

Overview

Sharan Sheth co-created Intelligere Wealth with his long term colleague and best mate, Sean Nigh, on 17 August 2020. Prior to this, Sharan and Sean worked together at a boutique financial planning firm for 11 and 10 years respectively, gaining significant experience and creating incredible memories along the way.

The English word intelligence stems from the Latin root word intelligere, meaning 'to understand'. The mantra of Intelligere Wealth is rooted in understanding you: our clients.

Our paradigm expands as things once misunderstood become clearly defined. The possibilities in life branch outward as the dots are connected and their patterns revealed.

The Fibonacci Sequence, also known as The Numbers of Nature is a mathematical sequence discovered in the 1200's by Leonardo Bonacci (son of Fibonacci) which represents one of the most intriguing discoveries connecting the man made world of mathematics and finance to the natural world. Our logo, the Fibonacci Tree, branches out in this famous sequence, symbolising the interconnectedness.

The art of financial planning is to intimately connect the narrative between the calculated world humans have created and the real world we seek to maximise enjoyment from.

At Intelligere Wealth we make it our business to understand people, their goals and their wealth.

Founded 17 August 2020 on timeless principles.

Sharan is a Sub-Authorised Representative of Intelligere Wealth Pty Ltd, Corporate Authorised Representative No. 1283009. Authorised Representative No. 403751.

Qualifications

Sharan Sheth holds the following qualifications and meets the competency requirements under ASIC’s Regulatory Guide RG 146.

- Bachelor of Commerce (Accounting) – University of Mumbai
- Master of Commerce (Financial Planning and Accounting) – Griffith University
- Graduate Diploma of Management – Central Queensland University
- Certified Financial Planner CFP® - Financial Planning Association of Australia

Sharan Sheth

Intelligere Wealth

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Professional Memberships

Sharan Sheth is a member of the following professional bodies and abides by their code of professional conduct and ethics:

- Financial Planning Association of Australia (FPA)
- Association of Financial Advisers (AFA)
- Tax Practitioners Board – Tax (Financial) Adviser

Authorisations

Sharan Sheth 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
- Standard Margin Lending Facility

Intelligere Wealth Advice Fees and Charges

Sharan Sheth 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.

Sharan Sheth'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.

Intelligere Wealth 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. Sharan Sheth is a Director of Intelligere Wealth Pty. Ltd. and will receive a salary/benefit from this company.

Other Benefits Sharan Sheth May Receive

From time to time Sharan Sheth 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.

Capstone
FINANCIAL PLANNING

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