

FINANCIAL ADVISER PROFILE



Who is my Adviser?

Matrix Norwest Financial Planners Pty Ltd is a Corporate Authorised Representative of Matrix Planning Solutions Limited. Their details are below:

Matrix Norwest Financial Planners Pty Ltd

ASIC AR No. 252822 | ABN No. 38 003 667 669

Business Address: Unit 306/10 Century Circuit, BAULKHAM HILLS NSW 2153
Postal Address: PO Box 6787, BAULKHAM HILLS NSW 2153
T: 02 9899 6077
F: 02 9899 6067
E: mail@matrixnorwest.com.au
W: www.matrixnorwest.com.au

Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, Matrix Norwest Financial Planners Pty Ltd offers you a wide range of services to assist you in planning towards achieving your financial goals. We are committed to providing you with the highest level of advice by offering you a complete solution to your needs and have authorised the individuals listed below to provide you with general and personal financial advice; as well as credit assistance.

Rob Pedersen

Adviser Qualifications & Memberships

Rob is an Authorised Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- CERTIFIED FINANCIAL PLANNER™
- A Diploma of Financial Planning
- A Diploma of Australian Insurance Institute
- An Australian Lifewriters Association LUATC I
- An Australian Lifewriters Association LUATC II
- An Australian Lifewriters Disability Insurance
- Member of Financial Planning Association of Australia (FPA)
- Member of the Association of Financial Advisers (AFA)

- Member of Million Dollar round Table (MDRT)

His Australian Securities and Investments Commission (ASIC) AR number is: 252893. Rob is the Director of Matrix Norwest Financial Planners Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.

Christina Gu

Adviser Qualifications & Memberships

Christina is an Authorised Representative of Matrix Planning Solutions Limited. Her educational qualifications and membership of Professional Associations are:

- CERTIFIED FINANCIAL PLANNER™
- Graduate Diploma of Financial Planning (Finsia)
- Master of Commerce (Advanced Finance) (University of UNSW)
- Member of Financial Planning Association of Australia (FPA)

Her Australian Securities and Investments Commission (ASIC) Authorised Representative number is 303850. Christina is an employee of Matrix Norwest Financial Planners Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.

Matthew Stevenson

Adviser Qualifications & Memberships

Matthew is an Authorised Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- Advanced Diploma of Financial Services
- Bachelor of Commerce, Economics and Finance
- Diploma of Superannuation Management
- Member of the SMSF Association
- SMSF Specialist Advisor & Auditor
- Chartered Tax Adviser (CTA) Member of the Tax institute of Australia



His Australian Securities and Investments Commission (ASIC) AR number is: 443544. Matthew an employee of Matrix Norwest Financial Planners Pty Ltd which is a Corporate Authorised Representative of Matrix Planning Solutions Limited.

Matrix Norwest Financial Planners Pty Ltd provides financial advice in the following areas:

- Personal and Corporate Superannuation
- Pre Retirement Planning & Retirement Planning
- Personal Life Insurance (Life, Total & Permanent Disablement, Trauma, Income Protection)
- Business Life Insurance (Key Man, Business Expenses, Buy Sell)
- Saving / Investment Plan
- Debt Management
- Estate Planning

Matrix has also accredited Bradley, Rob and Matthew to provide advice in the following additional product areas:

- Self Managed Superannuation Funds (SMSF)
- Shares

What types of Financial Products is Matrix authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:
 - Managed investments including investor directed portfolio services
 - Superannuation
 - Retirement savings accounts (RSA)
 - Debentures, stocks or bonds issued or proposed by governments
 - Basic and other deposit products
 - Securities
 - Life products including investment and risk
 - Standard Margin Lending Facilities

- Credit Assistance

If you do not wish to receive advice, Rob, Christina and Matthew may deal on your behalf by carrying out your instructions. If you do not obtain advice, you face the risk that the Financial Product/s you select may not fully take into account your objectives, financial situation or needs.

Matrix Planning Solutions Limited is responsible for the financial services provided including the distribution of this Financial Services & Credit Guide (FSG/CG).

Matrix Planning Solutions Limited (ABN 45 087 470 200) Australian Financial Services and Australian Credit Licensee License No. 238256.

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on 02 9899 6077. Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.