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Financial Planner Profile

Bertrand Bouchez

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Your Financial Planner

Your Financial Planner will be Bertrand Bouchez – an employee and Representative of Health Super Financial Services Pty Ltd trading as FSS Financial Planning (FSSFP). FSSFP is a holder of an Australian Financial Services Licensee number 240019.

This Financial Services Guide (FSG) consists of two parts:

Part 1 –titled 'Financial Services Guide' which provides you with general information about FSSFP, and your financial planner; and

Part 2 – this document titled 'Financial Planner Profile', which provides you with more specific information about your financial planner.

This document should be read in conjunction with Part 1 of the FSG, if you have not received your copy of the FSG, please contact Bertrand. The FSG is also available on FSSFPs website.

Qualified professional

Bertrand has completed the Diploma of Financial Services (Financial Planning) and is currently completing his Advanced Diploma of Financial Services (Financial Planning).

Experience

Bertrand had over eight years experience in the financial services industry, and two years as a financial planner. Bertrand shares FSSFPs business philosophy of providing quality financial advice with a high level of care and professionalism and is well placed to guide you towards effectively managing your accumulated retirement funds.

Specialist product advice

Bertrand is authorised to provide you with product advice and deal in the following financial products:

- Superannuation & Retirement Savings Accounts;
- Life insurance, including investment and risk insurance products;
- Managed investments (including Investor Directed Portfolio Services);
- Government debentures, stocks or bonds;
- Securities;
- Deposit products;
- Standard Margin Lending products.

How to contact Bertrand

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