

Financial Planner Profile

Geoffrey Lawley

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Your Financial Planner

Your Financial Planner will be Geoffrey Lawley – an ASIC Authorised Representative #332082 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. Geoff is an employee of First State Trustee Corporation, the Trustee of First State Superannuation Scheme of which HSFP is a wholly owned investment.

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

Part 1 –titled 'Financial Services Guide' which provides you with general information about HSFP, 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 Geoff. The FSG is also available on the FSSFP website.

Qualified professional

Geoff is a member of the Financial Planning Association (FPA) and has held the Certified Financial Planner (CFP™) designation, awarded by the association, since 1992.

Experience

Geoff has over 25 years experience in the financial services industry and over 22 years experience as financial planner. Geoff 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 realising a secure and rewarding financial future.

Specialist product advice

Geoff 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 Geoff

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