

Financial Planner Profile

Ian Purse

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Your Financial Planner

Your Financial Planner will be Ian Purse – 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 Ian. The FSG is also available on FSSFPs website.

Qualified professional

Ian is a Certified Financial Planner (CFP™), as awarded by the Financial Planning Association (FPA) and a Certified Practising Accountant (CPA™) as awarded by CPA Australia. He holds a Bachelor of Business Degree (Accounting & Finance) from UTS and the Diploma of Financial Planning from Deakin University.

Ian is a member of the Financial Planning Association and CPA Australia; he is also a Justice of the Peace (JP).

Experience

Ian has over 36 years experience in the financial services industry and over 14 years experience as financial planner. Ian 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

Ian 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 Ian

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