

ADVISER PROFILE

YOUR ADVISER

Alan McCormick

Authorised Representative No: 223019

Experience:

Alan's experience includes Financial Planning for both individuals and small to medium corporations as well as small business accounting and advice. In addition he has held senior Finance positions in Insurance and Reinsurance companies for over 25 years, during which time he had extensive Financial Control responsibilities for investments and insurance risk products.

Qualifications:

Alan is a professionally qualified accountant specialising in Financial Planning.

Professional Memberships:

Alan is a Fellow of The Chartered Association of Certified Accountants in the UK and an Associate Member of the Financial Planning Association of Australia.

Contact Details:

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AUTHORISATIONS

Alan is authorised to provide advice on the following:

Investment Products

(Basic Deposit Products, Debentures, Managed Investments, Superannuation Products and Retirement Savings Accounts)

Insurance Investment Products

(Annuities, Superannuation, Allocated Pensions, Investment Bonds)

Risk Insurance

(Trauma, Income Protection, Death and Disability)

FEES & CHARGES

Investment Advice:

For individual investments, we may receive an initial commission and/or an ongoing commission from the Fund Manager on the investment you make. Any initial commissions would be a portion of any entry fee charged by Fund Managers on placement of investments. Entry fees, if applicable, are charged whether you place the investment through us or directly through the Fund Manager.

For Corporate or Individual Superannuation plans, the Authorised Representative will be remunerated by the product issuer. An alternative available to larger individual funds is a fee for service. Full details can be provided on request, all fees and charges will be fully disclosed when providing recommendations.

Risk advice:

Financial Planning & Life may be entitled to receive commissions and other benefits, paid to them by the insurance companies, upon the placement of policies. Alan will receive a percentage of these commissions and benefits. Full details of commissions and any other benefits will be disclosed upon

Financial Planning & Life Pty Ltd

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