

Financial Services Guide

Adviser Details



Company Name: Hunter Financial Planning Pty Limited

Adviser Name: Mitchell Donnelly

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Who is my adviser?

Your adviser is Mitchell Donnelly. His Australian Securities and Investments Commission (ASIC) number is: 389347. Mitchell's educational qualifications and membership of professional associations are:

- Bachelor of Finance (University of Newcastle)
- Diploma of Financial Services (Financial Planning)

Mitchell is an Authorised Representative of Matrix Planning Solutions Limited. If you do not wish to receive advice, Mitchell 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.

Who is associated with my Adviser?

As well as being accredited by Matrix to provide financial services, Mitchell is an employee of Hunter Financial Planning Pty Limited, which is a principal agreement holder and corporate authorised representative of Matrix Planning Solutions Limited.

What types of advice does Mitchell provide?

- 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 Plans
- Debt Reduction
- Estate Planning

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact Mitchell on: 02 4943 4876.

Please retain this document for your reference, as it may be of assistance when you contact Matrix Planning Solutions Limited or Mitchell Donnelly in the future.