



MATRIX
PLANNING SOLUTIONS



Hunter Financial

Financial Services Guide

Adviser Details



Company Name: Hunter Financial Planning Pty Limited

Adviser Name: Phil Smith

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Who is my adviser?

Your adviser is Philip. His Australian Securities and Investments Commission (ASIC) number is: 252870. Philip's educational qualifications and membership of professional associations are:

- A Bachelor of Commerce
- A Diploma of Financial Planning
- A Member of Million Dollar Round Table (MDRT)

Philip is an Authorised Representative of Matrix Planning Solutions Limited. If you do not wish to receive advice, Philip 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, Philip 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 Philip 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
- Shares
- Gearing / Margin Lending

What types of Financial Product/s is Matrix and your adviser authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:
Managed investments including investor directed portfolio services

*Superannuation
Retirement savings accounts (RSA)
Debentures, stocks or bonds issued or proposed by governments
Basic and other deposit products
Securities
Life products including investment and risk
Margin Lending*

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact Philip 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 Philip Smith in the future.