



ABOUT YOUR ADVISER



Eliza Kelly

Financial Adviser

Authorised Representative No. 1297407

Eliza started in the Financial Services industry in 2018 as a Paraplanner and during this time completed her Bachelor of Commerce at Deakin University and her Financial Planning Professional Year Program. Eliza's goal is to reduce the complexity surrounding financial matters for her clients, remove stress associated with making financial decisions, and provide pathways for her clients to be able reach their financial goals.

Education, Qualifications & Memberships

- Bachelor of Commerce, Financial Planning (Deakin University)
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Eliza authorised to provide?

Eliza is authorised to provide financial product advice and deal in a financial product, to retail and wholesale clients, in relation to the following financial products:

- Basic deposit and payment products
- Debentures, stocks or bonds issued or proposed to be issued by a government
- Life products, including investment life insurance products and life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services – these are managed funds, master trusts and “wrap” accounts
- Retirement savings accounts (“RSA”) products
- Securities – meaning shares listed on the Australian Stock Exchange
- Superannuation, including self-managed, personal super or corporate super

Providing Entity Authorisations

Eliza is authorised to provide advice and services on behalf of the following entities, which are all owned by Adrians Wealth Management Pty Ltd | AFS License 522841

Entity*	ABN	Corporate Authorised Representative (CAR) #
Adrians Private Wealth Pty Ltd	35 619 714 377	1257272
Optimum Financial Planning Pty Ltd	42 159 437 573	425834
Optimum Financial Planning Services Pty Ltd (trading as Optimum Private Wealth)	51 694 936 368	1320093

* Please refer to your advice document to confirm which CAR the advice was provided under.

Remuneration

Eliza is remunerated by a base salary and potential bonus. Any bonus is based on meeting individual key performance indicators and overall profitability of the business.

Benefits, interest, and associations

Eliza does not have any related parties, shareholdings or referral arrangements that may influence the advice provided to you.

Eliza's Office & Contact Details for Adrians Private Wealth

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