

ABOUT YOUR ADVISER



Eliza Kelly

Wealth 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 personal super and/or corporate super

Remuneration

Eliza is remunerated by a base salary and bonus.

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

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