

Adviser Profile

Alex Porter

This document forms **Part B** of our Financial Services Guide and must be read together with **Part A** – Practice.

About Alex Porter

Alex Porter is an Authorised Representative (AR number 1273088) of Lifewealth Pty Ltd AFSL no. 279615



Professional Qualifications and Memberships

- Bachelor of Commerce (Finance & Marketing)
- Diploma of Financial Planning

Advice and services I can provide

Alex is authorised to provide advice on and deal in the following strategies:

- Deposit and Payment Products
- Government Debentures, Stocks, and Bonds
- Life Insurance Products (both Investment and Risk)
- Managed Investment Schemes
- Retirement Savings Account Products
- Securities
- Superannuation (excluding Self-Managed Super Funds)

And the following products:

- Deposit and payment products
- Government debentures, stocks or bonds
- Investment life insurance products
- Life risk insurance products
- Managed Investment Schemes

- (including investor directed portfolio services)
- Superannuation and Retirement Savings Account products
- Securities
- Superannuation (including Self-Managed Super Funds)
- Standard Margin Lending

How am I paid

I am an employee of Ironbark and receive a salary and a potential bonus from Ironbark. Any potential bonus paid is based on meeting individual key performance indicators and the overall profitability of our practice.



Contact details:

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