

## Adviser Profile

# Allan Phu

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

### About Allan Phu

Allan Phu is an Authorised Representative (AR number 1269333) of Lifewealth Pty Ltd AFSL no. 279615.



### Professional Qualifications and Memberships

- Graduate Diploma in Financial Planning
- Certified Financial Planner CFP®
- Bachelor of Engineering

### Advice and services I can provide

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

- Investment strategies e.g., savings plans, structures
- Superannuation and rollover strategies
- Investment product advice e.g., Basic deposit products, government debenture bonds ASX listed securities, managed investment schemes and structured investment products, retirement savings accounts.
- Retirement and pre-retirement strategies
- Centrelink Strategies
- Portfolio management and review services
- Personalised administration service for your direct portfolio

And the following products:

- Deposit and Payment Products – Non-basic Deposit products

- Government Debentures, Stocks or Bonds
- Life Products – Including Investment Life insurance products and Life Risk insurance products
- Retirement Savings Account products
- Securities
- Managed Investment Schemes including IDPS
- Superannuation – Excluding Self-Managed Super Funds
- Standard Margin Lending Facility

## 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:

**Address:** Level 21/8 Exhibition St, Melbourne  
VIC 3000

**Postal:** Level 21/8 Exhibition St, Melbourne  
VIC 3000

**Phone:** (03) 9670 3434

**Email:** [allan.phu@ironbarkfg.com.au](mailto:allan.phu@ironbarkfg.com.au)

**Website:** [ironbarkfg.com.au](http://ironbarkfg.com.au)