

Adviser Profile

Bertrand Bouchez

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

About Bertrand Bouchez

Bertrand Bouchez is an Authorised Representative (AR number 1002413) of Lifewealth Pty Ltd AFSL no. 279615.



Professional Qualifications and Memberships

- Master of Financial Planning
- Graduate Diploma of Financial Planning
- Advanced Diploma of Financial Planning

Advice and services I can provide

Bertrand 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
- Debt management
- Personal insurance strategy and product advice
- Portfolio management and review services

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)

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: bertrand.bouchez@ironbarkfg.com.au

Website: ironbarkfg.com.au