Ironbark Private Wealth

Adviser Profile

James Vandeloo

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

About James Vandeloo

James Vandeloo is an Authorised Representative (AR number 311965) of Lifewealth Pty Ltd AFSL no. 279615.

Professional Qualifications and Memberships

- Certified Financial Planner
- Bachelor of Business
- Advanced Diploma in Financial Services (Financial Planning)
- CFP Member of the Financial Planning Association
- RG146 Compliant (inc. Margin Lending Accreditation)
- Associate Member of the Institute of Public Accountants
- Associate Member of the Institute of Financial Accountant

Advice and services I can provide

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

- Investment strategies e.g. savings plans, structures
- Superannuation and rollover strategies
- Tax effective wealth accumulation strategies, such as gearing and standard margin lending facilities
- Investment product advice e.g. Basic deposit products, government debenture bonds ASX listed securities, managed investment schemes and structured investment products, retirement savings accounts.

- Self-managed superannuation fund advice (non-tax)
- Retirement and pre-retirement strategies
- Centrelink strategies
- Personal insurance strategy and product advice
- Retrenchment advice
- Portfolio management and review services
- Personalised administration service for your direct portfolio

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)
- Retirement Savings Account products
- Securities
- Superannuation (including Self-Managed Super Funds)
- Standard Margin
- Lending

James is also authorised under the Tax Practitioners Board (TAB) to explain the tax implications of the advice he provides as a Financial Adviser.

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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