

Adviser Profile

Mark Henry

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

About Mark Henry

Mark Henry is an Authorised Representative (AR number 1261042) of Lifewealth Pty Ltd AFSL no. 279615



Professional Qualifications and Memberships

- Certified Financial Planner®
- Bachelor of Commerce (Financial Planning & Accounting)
- Member of Financial Planning Association
- Margin Lending and SMSF Accredited

Advice and services I can provide

Mark 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

Mark is also authorised by the Tax Practitioners Board (TPB) 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:

Address: 55 Sharp St, Newtown VIC 3220

Postal: 55 Sharp St, Newtown VIC 3220

Phone: (03) 9670 3434

Email: mark.henry@ironbarkfg.com.au

Website: ironbarkfg.com.au