

## Adviser Profile

# Simon Schembri

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

### About Simon Schembri

Simon Schembri is an Authorised Representative (AR number 438153) of Lifewealth Pty Ltd AFSL no. 279615.



### Professional Qualifications and Memberships

- Certified Financial Planner
- Bachelor of Business (Accountancy)
- Advanced Diploma in Financial Services (Financial Planning)

### Advice and services I can provide

Simon 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
- Aged Care Specialist
- 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)
- 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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