Adviser Profile

Wendy Lam

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

About Wendy Lam

Wendy Lam is an Authorised Representative (AR number 1271975) of Lifewealth Pty Ltd AFSL no. 279615

Professional Qualifications and Memberships

- Graduate Diploma of Financial Planning
- Bachelor of Business (Accountancy) – RMIT
- Master of Finance - RMIT

Advice and services I can provide

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

- Deposit and Payment Products
- Government Debentures, Stocks, and Bonds
- Life Insurance Products (both Investment and Risk)
- Managed Investment Schemes
- Retirement Savings Account Products
- Superannuation

And the following products:

- Deposit and Payment Products - Non-basic Deposit Products
- Government Debentures, Stocks or Bonds
- Investment Life Insurance Products
- Life Risk Insurance Products
- Managed Investment Schemes, including IDPS

Ironbark Private Wealth

- Retirement Savings Account Products
- Superannuation - All
- Standard Margin Lending Facility

Wendy is also authorised by the Tax Practitioners Board (TPB) to explain the tax implications of the advice she 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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