

Adviser Profile

Aaron Caldwell

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

About Aaron Caldwell

Aaron Caldwell is an Authorised Representative (AR number 1298249) of Mercury Private Pty Ltd AFSL no. 473466.



Professional Qualifications and Memberships

- Bachelor of Commerce
- Master of Financial Planning

Advice and services I can provide

Aaron 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
- Self-managed superannuation fund advice
- Retirement and pre-retirement strategies
- Personal insurance strategy and product advice
- Portfolio management, review services and personalised administration services for your direct portfolio
- Estate planning strategies
- Centrelink strategies

And the following products:

- Deposit and payment products
- Securities
- Superannuation
- Investment Life Insurance Products and Life Risk Insurance Products
- Managed Investment Schemes including IDPS
- Bonds
- 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:

Address: Level 17/60 Martin Place, Sydney
NSW 2000

Postal: P.O Box R203, Royal Exchange NSW
1225

Phone: (02) 9152 8915

Email: aaron.caldwell@ironbarkfg.com.au

Website: ironbarkfg.com.au