Ironbark Private Wealth

Adviser Profile

Kapil Mistry

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

About Kapil Mistry

Kapil Mistry is an Authorised Representative (AR number 1001081) of Mercury Private Pty Ltd AFSL no. 473466.



Professional Qualifications and Memberships

- Bachelor of Commerce
- Diploma of Financial Planning
- Advanced Diploma of Financial Planning
- Tax for Financial Advising Qualified

Advice and services I can provide

Kapil 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
- 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

And the following products:

- Deposit and Payment Products
- Government Debentures, Stocks or Bonds
- Life Products including Investment Life Insurance Products and Life Risk Insurance Products
- Managed Investment Schemes including IDPS
- Securities
- Superannuation
- Margin Lending Facility

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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