Whitsunday Wealth™

Representative Profile

This Representative Profile, which forms part of the Financial Services Guide (Please see website for latest version), gives you information about your financial adviser and what services they can offer you.

Your financial adviser

Your financial adviser, Kate Schembri (Authorised Representative No. 269186) of Consultum Financial Advisers Pty Ltd ABN 65 006 373 995, Australian Financial Services Licence Number 230323 ("Consultum") trading as Whitsunday Wealth.

Phone: 07 4957 5822 or 0475 815 387
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Website: www.whitsundaywealth.com.au

In 1998, Kate began her career in a Financial Planning firm as a Receptionist, after a few position changes, promotions and completion of her Diploma of Financial Planning, she officially began advising in 2006. In 2014, she completed a Diploma of Accounting then in 2017 completed her Masters in Financial Planning.

Kate's main objective is to ensure the true intentions of the client are sought from all areas of Financial Planning, this ensures the outcome for the client is exactly where the client wants to be.

The Financial Services we offer are provided by "Whitsunday Wealth Pty Ltd ACN 168 432 004 as Trustee of the Whitsunday Wealth Unit Trust" ABN 31 520 375 694 trading as Whitsunday Wealth.

Authorised Representative No. 269186

Consultum Financial Advisers has authorised him to provide you with this Financial Services Guide.

What we do

Kate Schembr is authorised by Financial Advice Association of Australia to provide financial advice in relation to:

- Wealth accumulation
- Income and asset protection
- Tax strategies
- Superannuation
- Retirement and redundancy planning
- Estate planning
- Government benefits
- Debt management

And to provide advice and deal in the following financial products:

- Basic deposit products
- Non-basic deposit products
- Non-cash payment products
- Derivatives
- Government debentures, stocks or bonds
- Life products – Investment Life insurance
- Life products – Life risk insurance products
- Managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings account products
- Securities
- Superannuation

Contact us

For more information on anything you have read in this FSG, to obtain a copy of our privacy policy or if there is anything else we can help you with, please contact Kate Schembri or visit our website **whitsundaywealth.com.au**

Referrals

Referrals from a third party

At present we do not have any referral arrangement in place to pay a third party referrer a referral fee, commission or other benefit. If this changes, we will make you aware of this prior to providing advice, or further advice, to you.

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