

This Adviser Profile, together with the accompanying Financial Services Guide (FSG), is designed to assist you in selecting which of our services will be of benefit to you.

Stonehouse Financial Partners Pty Ltd (the Licensee) holds an Australian Financial Services Licence (No. 520339). Based on Declan's qualifications, experience and resources the Licensee has authorised Declan to provide financial services under its licence.



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Declan has attained a Bachelor of Commerce Majoring in Financial Planning from the University of the Sunshine Coast and a Diploma of Financial Services (Financial Planning). He is a registered Tax (Financial) Adviser with the Tax Practitioners Board.

Declan specialises in the following areas of advice:

- Overall Financial Strategy and Planning
- Investments
- Superannuation, including Self-Managed Super Funds (SMSF's)
- Retirement Planning
- Wealth Accumulation / Creation
- Taxation Minimisation
- Wealth Protection, including Life, Disability and Critical Illness Insurances
- Estate and Succession Planning

The Licensee authorises Declan to provide financial advice relating to the following classes of financial products:

- Managed Investment Trusts
- Superannuation
- Government Debentures, Stocks and Bonds
- Securities
- Deposits
- Life Insurance (risk and investment products)
- Retirement Savings Accounts
- Margin Lending