

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 Jeremy's qualifications, experience and resources the Licensee has authorised Jeremy to provide financial services under its licence.



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Jeremy holds a Bachelor of Commerce (Financial Planning) from Griffith University, a Diploma of Financial Services – Financial Planning (FINSIA) and the peak industry accreditation of CERTIFIED FINANCIAL PLANNER™ (CFP®) from the Financial Planning Association of Australia (FPA). He is a registered Tax (Financial) Adviser with the Tax Practitioners Board.

Jeremy specialises in the following areas of advice:

- Overall Financial Strategy and Planning
- Investments
- Superannuation
- Retirement Planning
- Taxation Minimisation
- Wealth Protection, including Life, Disability and Critical Illness Insurances
- Estate and Succession Planning

The Licensee authorises Jeremy 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