

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



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Steve holds a Bachelor of Business majoring in Finance from the University of Queensland and a Diploma of Financial Services (Financial Planning). Steve is an active member of the Financial Planning Association of Australia (FPA) after having achieved the highly regarded CERTIFIED FINANCIAL PLANNER™ (CFP®) designation.

Steve specialises in the following areas of advice:

- Overall financial strategy and planning
- Investments
- Superannuation, including Self-Managed Super Funds (SMSF's)
- Retirement Planning
- Wealth protection, including life, disability and critical illness insurances
- Estate and succession planning

The Licensee authorises Steve 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