

FINANCIAL ADVISER PROFILE



Who is my Adviser?

Norpoint Advisory Pty Ltd is a Corporate Authorised Representative of Matrix Planning Solutions Limited. Their details are below:

Norpoint Advisory Pty Ltd

ASIC AR No. 001238470 | ABN No. 90 163 954 327

Business Address: C8 The Solent Centre, 3 Burbank Place, Baulkham Hills NSW 2153

Postal Address: PO Box 7906, Baulkham Hills NSW 2153

T: 02 8824 3442 **E:** info@norpoint.com.au

Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, Norpoint Advisory Pty Ltd offers you a wide range of services to assist you in planning towards achieving your financial goals. We are committed to providing you with the highest level of advice by offering you a complete solution to your needs and have Matthew to provide you with general and personal financial advice.

Matthew Stevenson

Adviser Qualifications & Memberships

Matthew is an Authorised Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- Advanced Diploma of Financial Services
- Bachelor of Commerce, Economics and Finance
- Diploma of Superannuation Management
- Member of the SMSF Association
- Member of the Tax institute of Australia

His Australian Securities and Investments Commission (ASIC) AR number is : 443544. Matthew is the Director of Norpoint Advisory Pty Ltd which is a Corporate Authorised Representative of Matrix Planning Solutions Limited.

Norpoint Advisory Pty Ltd provides financial advice in the following areas:

- Personal and Corporate Superannuation
- Pre Retirement Planning & Retirement Planning
- Personal Life Insurance (Life, Total & Permanent Disablement, Trauma, Income Protection)
- Shares
- Life Insurance
- Saving / Investment Plan
- Debt Management
- Estate Planning

Matrix has also accredited Matthew to provide advice in the following additional product area:

- Self Managed Superannuation Funds (SMSF)

What types of Financial Products is Matrix authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:
 - Managed investments including investor directed portfolio services
 - Superannuation
 - Retirement savings accounts (RSA)
 - Debentures, stocks or bonds issued or proposed by governments
 - Basic and other deposit products
 - Securities
 - Life products including investment and risk

If you do not wish to receive advice, Matthew may deal on your behalf by carrying out your instructions. If you do not obtain advice, you face the risk that the Financial Product/s you select may not fully take into account your objectives, financial situation or needs.

Matrix Planning Solutions Limited is responsible for the financial services provided including the distribution of this Financial Services & Credit Guide (FSG/CG).

Matrix Planning Solutions Limited (ABN 45 087 470 200)
Australian Financial Services and Australian Credit Licensee License No. 238256.

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on 02 8824 3442. Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.