

Adviser Profile

Financial Services & Credit Guide

Part 2

1 July 2011

This adviser profile forms part of our Guide and provides you with further information about your Suncorp Financial Services Authorised Representative



Brett Ellis is an Authorised Representative of Suncorp Financial Services Pty Ltd and is authorised to provide you with advice in the following areas:

- Deposit & Payment Products
- Life Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Superannuation
- Credit assistance (excluding broking services)

Brett Ellis Dip.FS(FP), Comm. Dec

Authorised Representative No: 235257

Credit Representative No: 375976

Corporate Authorised Representative No: 233941

Business Name: Certified Planning & Insurance Services Pty Ltd

ABN: 14 100 194 312

Address:

Upper Level, Corner Corrie St and Hamilton Road
Chermside QLD 4032

PO Box 6
Chermside South QLD 4032

Phone: 07 3861 4313

Mobile: 0419 796 757

Fax: 07 3861 4308

Email: admin@cpis.com.au

Website: www.cpis.com.au

Experience

Brett joined CPIS in 2002 as a Life Risk specialist and furthered his studies in Financial Planning to become a qualified Financial Planner. He specialises in the areas of:

- Wealth Accumulation
- Retirement Planning
- Asset Protection
- Risk Analysis

Education

- Diploma of Financial Services (Financial Planning)

Memberships

- Brett holds a Commissioner for Declarations with the Department of Justice.

Head Office
Suncorp Financial Services Pty Limited
ABN 50 010 844 621 AFSL & ACL No. 229885



GPO Box 1453, Brisbane QLD 4001



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sfsagenciesdirect@suncorp.com.au

Client Servicing

My practice may be offered exclusive client servicing rights after a period of time if certain conditions are met. These include achieving minimum sales and business retention targets set by Suncorp Financial Services in relation to superannuation, investment funds and insurance products. Specifically, my practice would need to generate new business of at least \$2,000,000 per annum into Suncorp superannuation and investment products, or at least \$50,000 premium per annum into Suncorp insurance products. Furthermore, my practice would have to ensure that 90% of clients retain their investment in Suncorp products (from the date I became a corporate authorised representative of Suncorp Financial Services to the date my practice is offered exclusive client servicing rights).

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1 April 2011

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Doug Sims is an Authorised Representative of Suncorp Financial Services Pty Ltd and is authorised to provide you with advice in the following areas:

- Deposit & Payment Products
- Life Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Superannuation
- Credit assistance (excluding broking services)

Doug is also authorised to advise in relation to:

- Negative Gearing / Margin Lending involving Managed Investments

Doug Sims CFP[®], Dip FP, JP(Qual)

Authorised Representative No: 287599

Credit Reference No: 376010

Corporate Authorised Representative No: 233941

Business Name: Certified Planning & Insurance Services Pty Ltd

ABN: 14 100 194 312

Address:

Upper Level, Corner Corrie St and Hamilton Road
Chermside QLD 4032

PO Box 6
Chermside South QLD 4032

Phone: 07 3861 4313

Mobile: 0402 193 728

Fax: 07 3861 4308

Email: admin@cpis.com.au

Website: www.cpis.com.au

Experience

Doug entered the Financial Planning industry in 1994 establishing his own practice in Townsville with his wife and daughter under Colonial (which later changed to Financial Wisdom).

He received the Diploma of Financial Planning and became a CFP[®] professional in 2003.

Doug sold the Townsville practice in 2004 and following a leave of absence for 15 months started with CPIS and Suncorp Financial Services in April 2005. He specialises in advice in the following areas:

- Wealth Accumulation
- Retirement Planning
- Centrelink Strategies
- Asset Protection
- Risk Analysis

Education

Doug holds the following qualifications:

- CERTIFIED FINANCIAL PLANNER[™]
- Diploma of Financial Planning (Deakin)

Memberships

Doug is a member of the Financial Planning Association (FPA) and has the status of CERTIFIED FINANCIAL PLANNER[™] professional.

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