

# FINANCIAL ADVISER PROFILE



## Who is my Adviser?

Churchill Financial Planners is a Corporate Authorised Representative of Matrix Planning Solutions Limited. Their details are below:

### Churchill Financial Planners Pty Ltd

ASIC AR No. 252817

**Business Address:** 117 Solomon Street,

FREMANTLE WA 6160

**Postal Address:** PO Box 686, SOUTH FREMANTLE

WA 6162

**T:** (08) 9335 7222

**F:** (08) 9335 7444

**E:** [russell@churchillfp.com.au](mailto:russell@churchillfp.com.au)

**W:** [www.matrixplan.com.au](http://www.matrixplan.com.au)

## Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, Churchill Financial Planners 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 authorised the individuals listed below to provide you with general and personal financial advice.

### Russell Fletcher Adviser Qualifications & Memberships

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

- A Certified Insurance Professional (CIP)
- Advanced Diploma of Services (Financial Planning)
- A member of ANZIIF



His Australian Securities and Investments Commission (ASIC) AR number is: 252888. Russell Fletcher is the

Director of Churchill Financial Planners Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.

### Churchill Financial Planners 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)
- Gearing
- Shares
- Business Life Insurance (Key Man, Business Expenses, Buy Sell)
- Saving / Investment Plan
- Debt Management
- Estate Planning
- 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
  - Standard Margin Lending Facilities
  - Credit Assistance

If you do not wish to receive advice, Russell 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

Level 3, 31 Market Street SYDNEY NSW 2000

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on (08) 9335 7222. Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.