

Adviser Profile

This adviser profile is Part 2 of our Financial Services & Credit Guide and provides you with further information about your Suncorp Financial Services Authorised Representative



Alison Keep Dip.Acc, Dip.FS (FP)

Aus Insurance and Financial Solutions Pty Ltd
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SUNCORP



Suncorp Financial Planning



Alison Keep 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

How can Alison help you?

Alison can work with you to gain an understanding of your personal circumstances, in particular your financial commitments and lifestyle expectations, and provide tailored advice to help you:

- protect your family and future with personal insurance
- invest for future goals (eg. children's education)
- make the most of redundancies, inheritances and insurance payouts.
- track lost super and consolidate your super accounts to minimise fees and charges

Experience:

Alison has over 5 years' experience in the financial services industry, starting in the role of client relationship manager and personal assistant to the director, and eventually as a financial planner. This path has provided her with different vantage points and has enabled her to provide her clients with the effective and efficient service experience they seek.

She specialises in Personal Insurance planning.

Alison is dedicated to ensuring her clients reach their financial and personal goals by delivering a comprehensive financial plan. She prides herself in making this journey as simple and effortless as possible through his exceptional service and industry knowledge.

Alison Keep

Authorised Representative No:
450125

AUS Insurance and Financial Solutions Pty Ltd

Corporate Authorised
Representative No: 240406

Education:

- Diploma of Financial Services (Financial Planning)
- Diploma of Accounting

Head Office

Suncorp Financial Services P/L
ABN 50 010 844 621
AFSL & ACL No. 229885



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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).