

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



Peter McCarthy Dip.FS (FP)

Aus Insurance and Financial Solutions Pty Ltd
ABN 64 106 124 163

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Peter McCarthy 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
- Business Insurance Strategies
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Superannuation
- Retirement Income Streams

How can Peter help you?

Peter 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:

- grow your retirement nest egg
- invest for future goals (eg. children's education)
- protect your family and future with personal insurance
- take advantage of economic and legislative changes to reduce the tax you pay
- make the most of redundancies, inheritances and insurance payouts

If you own or manage a business, Peter can also help you meet your Employee Superannuation obligations and assist with your business insurance needs.

Experience:

Peter has over 19 years experience in the Financial Services Industry. Prior to beginning his own Corporate Agency with Suncorp in 2000, Peter spent 5 years as Suncorp Insurance Consultant. He has a varied back ground in the areas of farming, commercial industry and financial services. The experience in these fields helps him understand his client's needs for financial protection.

Peter is passionate about helping clients understand the importance of financial protection strategies including superannuation. He aims to provide quality advice for life, trauma and income protection insurances so as to protect the assets, liabilities and lifestyles of each individual client.

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).

SUNCORP



Suncorp Financial Planning



Peter McCarthy

Authorised Representative No:
235358

AUS Insurance and Financial Solutions Pty Ltd

Corporate Authorised
Representative No: 240406

Education:

- Diploma of Financial Services (Financial Planning)

Head Office

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