



Financial Planner Profile

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This Financial Planner Profile is part of the Pear Tree Financial Planning Pty Ltd Financial Services Guide and these documents should be read together.

Introducing your Financial Planner

Company Name: Pear Tree Financial Planning Pty Ltd (AFSL 526 297)

Business Address: 98 Talbragar St, Dubbo, NSW 2830

Postal Address: PO Box 686, Dubbo, NSW 2830

Mobile Number: 0428 043 013

Email: awilliamson@peartreefinancial.com.au

Web Address: www.peartreefinancial.com.au

Alison Williamson (ASIC No. 380895) is your Financial Planner.

Alison has the following qualifications

- Bachelor of Business (Agricultural Commerce)
- Graduate Certificate in Finance
- Graduate Diploma of Financial Planning
- Graduate Certificate Self- Managed Superannuation

Alison is a

- Certified Financial Planning® Professional
- SMSF Specialist Adviser™
- SMSF Practitioner

Alison is a member of

- Financial Planning Association
- SMSF Association

Alison has 20 years' experience as a financial planner.

Products and Services

Your Financial Planner is authorised to provide you with general advice and personal financial product advice on the following class and types of products and can help you buy and sell these financial products.

- **Deposit products**
- **Life products, including**
 - Investment life insurance products
 - Life risk insurance products
- **Superannuation products, including**
 - Public offer superannuation funds
 - Account- based pensions and Complying annuities
 - Corporate superannuation funds
 - Self- managed superannuation funds
- **Margin lending facilities (standard)**
- **Retirement savings accounts**
- **Managed investment products, including;**
 - Master trusts, Wrap facilities
 - Property funds
 - Tax- effective investments
 - Managed trusts
 - Investor directed portfolio services
- **Government bonds, stocks or debentured securities;**
 - ASX listed shares, instalment warrants and fixed interest