

Adviser Profile

Part 2

Version 4
30 June 2021



This Adviser Profile has been authorised for distribution by Parker Wealth Management Pty Ltd and is to be read in conjunction with the Financial Service Guide (FSG) Part 1 version 4 dated 30 June 2021. This Adviser Profile forms part of the FSG.

Authorised Representative

Katharine (Kate) Laurina Whild (ASIC# 1283194)

Corporate Authorised Representative

Parker Financial Services Pty Ltd
(ASIC# 242984 ABN 88 010 783 285)

About your adviser

Kate Whild is a Financial Adviser and sub-Authorised Representative of Parker Financial Services Pty Ltd, which is a Corporate Authorised Representative of Parker Wealth Management Pty Ltd (AFSL# 519344).

Kate has more than ten years' experience in the financial services sector with a number of Canberra wealth management businesses, including a Big Four firm. Kate has an extensive breadth of knowledge having specialised in taxation and self-managed superannuation fund compliance and advice. Her focus is on identifying financial opportunities and implementing strategies to help her clients realise their financial and lifestyle goals.

Qualifications

A Certified Financial Planner™
Bachelor of Arts
Bachelor of Commerce
Graduate Diploma of Chartered Accounting
Graduate Diploma of Financial Planning
Diploma of Financial Planning

Professional Memberships

Chartered Accountants Australia and New Zealand
Financial Planning Association of Australia

Services

Kate is authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities