

Adviser Profile

Part 2

Version 3
1 June 2024



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 6 dated 1 June 2024. This Adviser Profile forms part of the FSG.

Authorised Representative

Carly Brooke Jackson (ASIC# 1295818)

Corporate Authorised Representative

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

About your authorised representative

Carly Jackson 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).

Carly joined Parker Financial Services in 2019. Carly completed a Bachelor of Commerce from the University of Canberra in 2021 and has undertaken her Professional Year with Parker Financial to comply with the Corporations Act 2001 requirements.

Carly is passionate about helping people make the right financial decisions and empowering clients by educating them on the strategies associated with money management. Carly helps clients identify and achieve their financial goals through developing strategic and investment advice, providing high-quality technical support, preparation of advice documents and financial modelling, and conducting client meetings.

Her education, experience and principles are the cornerstone to a new generation of advice.

Qualifications

Bachelor of Commerce (Banking & Financial Services and Financial Planning Majors)

Financial Statement Fundamentals - Small and Medium Enterprises

Services

Carly 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