

Adviser Profile

Part 2

Version 5
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

Paul Cooke (ASIC# 437099)

Corporate Authorised Representative

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

About your adviser

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

Paul has spent 25 years in the financial services industry. Prior to becoming a financial adviser, Paul developed expertise in a variety of sectors including corporate markets, financial accounting and property development. Paul's time spent growing up in a medical family and being married to a doctor has also helped him develop some unique insights into the financial well-being of medical practitioners. All this experience, combined with Paul's strong interest in economic markets, makes him well placed to advise clients across a wide range of investment opportunities.

Qualifications

Bachelor of Economics (Accounting Major)
Diploma of Financial Planning
Diploma from the Securities Institute of Australia
A Financial Planner AFP®

Professional Memberships

Financial Advice Association Australia (FAAA)
CPA Australia (CPA)

Services

Paul 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
- Margin lending