

Adviser Profile

Part 2

Version 7
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

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 16 years' experience in the financial services industry with a number of Canberra wealth management businesses, including a 'big four' firm. Beyond her technical expertise, Kate is known for her ability to simplify complex financial concepts, enabling her clients to make informed decisions. She takes pride in empowering her clients to take control of their financial well-being.

Kate and her husband grew up in Canberra and have two young children. Playing sport has been a passion for Kate and she now enjoys a round of golf when she can fit it in.

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 Advice Association Australia (FAAA)

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