



BERESFORDS

— Wealth Management —

ADVISER PROFILE

Trudi Beresford



“ Trudi listens to where I am at with my life and provides me with, not just planned advice, but ad-hoc advice that is very helpful. She answers my questions in a clear and simple way and is very caring, giving me peace of mind and security. I love the honesty and the ease of understanding my current status and future strategies.

”

Trudi Beresford, Director
Beresfords Wealth Management Pty Ltd
trudib@beresfords.com.au
02 9993 3900
Suite 3, Level 2, 201 Miller Street
North Sydney NSW 2060
www.beresfords.com.au

This Adviser Profile is part of the Beresfords Wealth Management Pty Ltd Financial Services Guide (FSG) and must be read in conjunction with the main document.

Am I authorised to provide financial services and products?

Yes, I am an Authorised Representative of Beresfords Wealth Management Pty Ltd, AR#246077 and a Registered Financial Adviser #1005116, and Tax (Financial) Adviser #251 63227.

I am also the Responsible Manager for Blicenced AFSL.

What areas am I authorised to advise on?

I am authorised by Beresfords Wealth Management Pty Ltd to advise, and to deal, on their behalf on the following financial services and products:

- Managed Investments
- Superannuation
- Retirement Income Streams
- Deposit Taking Facilities
- Margin Lending
- Life and Disability Income Insurance
- Portfolio Administration Services
- Retirement Savings Accounts
- Securities
- Structured Products
- Government Debentures, Stocks and Bonds.

In addition to the services listed on page 4 of the FSG, are there any services I am not authorised by Beresfords Wealth Management Pty Ltd to provide?

No, I am authorised to provide a full and comprehensive service.

What are your educational qualifications and experience?

- Certified Financial Planner (CFP)
- Master of Commerce (Financial Planning)
- Bachelor of Economics
- Tax (Financial) Adviser
- Diploma of Property Services
- Diploma of Financial Service / Mortgage Broking
- Certificate IV Accounting
- Registered BAS Agent

I have had experience in the financial services industry since 1996.

How am I paid?

I receive an annual salary as an employee of Beresfords Wealth Management Pty Ltd. I am entitled to receive additional remuneration for achieving Key Performance Indicators - these typically relate to meeting agreed client service standards, client satisfaction, workflow, professional development and quality of advice. I am also eligible to participate in a profit sharing arrangement.

I am a beneficiary of the shareholder of Beresfords Wealth Management Pty Ltd and its related parties and am the Director of some associated companies, all with a common ownership structure, and hence, may also receive dividend payments and/or achieve capital growth in respect of my beneficial shareholding.



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About me:

I began my career in the Wealth Management industry in 1996 after becoming disillusioned with the win / lose situations so prevalent in Industrial Relations.

I'm passionate about using my expertise in financial planning to really create clarity and peace of mind for my clients. Its a career that gives me immense satisfaction from the win / win outcomes that can be achieved - and that we consistently achieve at Beresfords.

I am a very compassionate Financial Planner, and though I'm proud of my qualifications, it is my love of relationships and my ability to empathise with people that allows me to really excel in my role.

I am dedicated to diligent financial planning and as committed to the provision of high quality advice and service as I am to each and every client.

I deeply appreciate and enjoy our ongoing relationships, which are very personal and highly valued.

As a Beresfords Director, I'm deeply involved in the leadership of our business to provide the very best strategic solutions for all our of clients.

Away from the office I enjoy cooking and reading, and love spending time with my family - especially camping, time at the beach, and travelling.