

# ADVISER PROFILE

PART B: VERSION 1.0: MARCH 2007

Note that this document is to be read in conjunction with PART A: Financial Services Guide.

## SEAN PROSSER Dip FS(FP)

Authorised Representative No 255413 of PATRON Financial Services Pty Ltd trading as PATRON Financial Advice. ABN 32 307 788 137 AFSL No 307379



**PATRON**  
Financial Advice

## CONTACT DETAILS

Trading Names	Lighthouse Financial Advisers
Street Address	13 The Crescent Penrith NSW 2750
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Email	Sean@lhfa.com.au



## SUMMARY

Sean is authorised to provide you with advice in the following areas:

- Life Insurance Products: Term Life, Total & Permanent Disablement (TPD), Trauma, Income Protection, Business Expenses
- Superannuation products (Accumulation and Pension)
- Retirement Savings Accounts
- Basic & non basic deposit products
- Managed Investments

Sean has four business specialities;

1. Helping families to protect their income and assets from the uncertainties created by the potential disablement or premature death of the primary income earner.
2. Helping young to middle age clients accumulate enough wealth to ensure a comfortable retirement.
3. Helping mature clients maximise their income in retirement as well as ensuring their affairs are arranged to allow the orderly succession of their assets to their estate.
4. Helping business owners focus on earning revenue by helping with the administrative burden of superannuation, as well as ensuring the business is protected if key employees become disabled or die.

## EXPERIENCE

Sean has been in the financial services industry for over 6 years and has been employed by a large financial services institute and more recently in his own business. Sean holds the diploma of financial services and is currently studying for his advanced diploma.

## QUALIFICATIONS

**Diploma of Financial Services (Financial Planning):**

- Entry Level Competencies
- Risk Management
- Investment Planning 1
- Superannuation & Retirement Planning

Partial Completion of **Advanced Diploma of Financial Services (Financial Planning)**.