

Adviser Profile

Introducing Brenda Soon



The Boutique Wealth Management Group Financial Services Guide (FSG), together with this Adviser Profile, form the full Boutique FSG.

This document should be read in conjunction with the Boutique Wealth Management Group FSG.

Is Brenda authorised to provide financial services and products?

Yes. Brenda is an authorised representative of Boutique. She is authorised to advise and to arrange to deal in financial services products, on behalf of Boutique.

Brenda is authorised by Boutique to advise you on the following services and products:

- Managed Investments
- Superannuation
- Personal Insurance
- Shares
- Self Managed Superannuation Funds.

Are there any services she is not authorised by Boutique to provide?

No there are no services that she has not been authorised by Boutique to provide.

What are her educational qualifications and experience?

Brenda has the following qualifications:

- Advanced Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Financial Planning)
- Bachelor of Science
- Bachelor of Veterinary Medicine & Surgery (Hons)

Brenda has been in the Financial Planning industry since 1998.

Does she provide referrals for certain services or receive referrals from other parties? If so, what benefit does she receive from these referrals?

Our business receives and welcomes referrals of clients that can benefit from our pro-active advice. Any referral arrangement, if any, will be outlined in your Statement of Advice.



FPA

FINANCIAL PLANNING
ASSOCIATION
of Australia Limited

PRINCIPAL MEMBER

Brenda conducts her financial planning activities under the registered name *Boutique Wealth Management Group Pty Ltd.*

If you would like to make an appointment to discuss your financial needs and objectives in more detail, please contact Brenda on (08) 9381-8779

She is located at Level 3, 1 Outridge Crescent, Subiaco WA 6008

Her email address is brenda.soon@boutiquewealth.com.au

Her website address is www.boutiquewealth.com.au