

Adviser Profile

Introducing Neil Cocker



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 Neil authorised to provide financial services and products?

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

Neil 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 He is not authorised by Boutique to provide?

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

What are his educational qualifications and experience?

Neil has the following qualifications:

- Diploma in Financial Planning from Deakin University in Melbourne
- Certified Financial Planner (CFP)

Neil has been in the Financial Planning industry since 1993.

Does he provide referrals for certain services or receive referrals for other parties? If so, what benefit does he 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.



Neil conducts his 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 Neil on (08) 9381-8779

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

His email address is neil.cocker@boutiquewealth.com.au

His website address is www.boutiquewealth.com.au