Part 2 Adviser Profile

Nadia Coffey

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There are two parts to the Financial Services Guide (FSG). This Adviser Profile forms Part two of your FSG and should be read in conjunction with Part one before making any decisions.

Introducing your financial adviser

Nadia Coffey and Northern Plateau Pty Ltd T/A Veschetti-Crompton Financial Advisers are Authorised Representatives of Northern Plateau Wealth Management Pty Ltd (NPWM), ABN 12 645 462 559, AFSL 528562

Suite 3, 154 Robert Street, Atherton QLD 4883

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Nadia commenced her financial planning career in late 2018. She has been working in this office since 2020 and became a licensed adviser again in 2021.

Authorisations

- Nadia Coffey ASIC Authorisation Number 1269211
- Veschetti-Crompton Financial Advisers ASIC Authorisation Number 464755

Qualifications and memberships

- Diploma of Financial Planning
- Graduate Diploma of Financial Planning
- Master of Financial Planning
- Commissioner for Declarations

How is your financial adviser paid?

The fees and commissions payable to Veschetti-Crompton Financial Advisers are explained in detail in part one of the FSG and below.

NPWM Pty Ltd may retain a percentage of these fees and commissions and then pay the balance to Veschetti-Crompton Financial Advisers, which engages your adviser to provide financial services. Of the amount received by Veschetti-Crompton Financial Advisers from NPWM Pty Ltd, your adviser is paid a salary and may receive bonuses.

Other benefits?

Apart from the "Other benefits" section disclosed in part one, there are no other benefits received or relationships that may influence the recommendation.

Financial products and services

Nadia Coffey is authorised by NPWM Pty Ltd to provide financial product advice on and deal with the following products with wholesale and retail clients:

Deposit and payment products

Government-issued debentures, stocks or bonds

Life investment or life risk products

Interests in managed investment schemes including:

- Investor directed portfolio services (IDPS)
- Master trusts, wrap facilities, property funds

Retirement savings accounts

Securities including:

- Active direct shares
- Exchange Traded Funds

Standard margin lending facilities

Superannuation, including:

- Public offer superannuation funds
- Account-based pensions and complying annuities
- Corporate superannuation funds
- Self-managed superannuation funds

Any tax agent services that are provided, including the preparation and filing of tax returns, liaison with the ATO etc, are not provided under NPWM's AFSL and are not covered by this FSG. They should be treated as a separate business activity.