



**MATRIX**  
PLANNING SOLUTIONS

# Financial Services Guide

## Adviser Details



### Who is my Adviser?

The details of your Matrix Planning Solutions Authorised Representatives

Company Name: GPA Group Pty Ltd

ASIC No. 277819 ABN No. 77 109 642 953

A: 1st Floor, 41-45 Newcomen Street, Newcastle, NSW, 2300

PO Box 820, Newcastle, NSW, 2300

T: (02) 4926-2022 F: (02) 4926-4789

E: [admin@gpamatrix.com.au](mailto:admin@gpamatrix.com.au) W: [www.gpamatrix.com.au](http://www.gpamatrix.com.au)

### Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, GPA Group Pty Ltd offers you a wide range of services to assist you in planning towards achieving your financial goals.

We are committed to providing you with the highest level of advice by offering you a complete solution to your needs and have authorised the individuals listed below to provide you with general and personal financial advice.



### Jason Poole

#### Adviser Qualifications

Jason's educational qualifications and membership of professional Associations are:

- Advanced Diploma of Financial Services (Financial Planning)
- Bachelor of Science Degree (Hons) Investment & Financial Risk Management

His Australian Securities and Investments Commission (ASIC) number is: 276499.

Jason is the Director of GPA Group Pty Ltd, which is a principal agreement holder and corporate authorised representative of Matrix Planning Solutions Limited.



### Mark Worrall

#### Adviser Qualifications

Mark's educational qualifications and membership of professional Associations are:

- Advanced Diploma of Financial Services (Financial Planning)

His Australian Securities and Investments Commission (ASIC) number is: 317127.

Mark is an Associate of GPA Group Pty Ltd, which is a principal agreement holder and corporate authorised representative of Matrix Planning Solutions Limited.



## Graham Poole

### Adviser Qualifications

Graham's educational qualifications and membership of professional Associations are:

- Diploma of Financial Services
- Associate Diploma of the Australian Insurance Institute (AAIL)

His Australian Securities and Investments Commission (ASIC) number is: 252894.

Graham is an Associate of GPA Group Pty Ltd, which is a principal agreement holder and corporate authorised representative of Matrix Planning Solutions Limited.

### What types of advice does GPA Group Pty Ltd provide?

- Personal and Corporate Superannuation
- Pre Retirement Planning & Retirement Planning
- Personal Life Insurance (Life, Total & Permanent Disablement, Trauma, Income Protection)
- Business Life Insurance (Key Man, Business Expenses, Buy Sell)
- Saving / Investment Plans
- Debt Reduction
- Estate Planning

Matrix has also accredited Jason, Mark and Graham to provide advice in the following additional product area:

- Shares

Jason and Mark have also been accredited by Matrix to provide advice in the following additional product areas:

- Margin Lending / Gearing

Jason, Mark and Graham have also been accredited by Matrix to provide advice in the following additional product area:

- SMSF

### What types of Financial Product/s is Matrix and your adviser authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:  
*Managed investments including investor directed portfolio services*

*Superannuation*

*Retirement savings accounts (RSA)*

*Debentures, stocks or bonds issued or proposed by governments*

*Basic and other deposit products*

*Securities*

*Life products including investment and risk*

Jason and Mark have been accredited in:

*Margin Lending*

If you do not wish to receive advice **Jason, Graham and Mark** may deal on your behalf by carrying out your instructions. If you do not obtain advice, you face the risk that the Financial Product/s you select may not fully take into account your objectives, financial situation or needs.

### Who is responsible for the financial services provided?

Matrix Planning Solutions Limited is responsible for the financial services provided including the distribution of this Financial Services Guide (FSG). Matrix Planning Solutions Limited ABN 45 087 470 200 Australian Financial Services Licensee, No. 238256 Level 3, 31 Market Street, Sydney, NSW 2000.

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on (02) 4926-2022 . Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.