

Adviser Profile

Part 2

Version 7
1 June 2024



This Adviser Profile has been authorised for distribution by Parker Wealth Management Pty Ltd and is to be read in conjunction with the Financial Service Guide (FSG) Part 1 version 6 dated 1 June 2024. This Adviser Profile forms part of the FSG.

Authorised Representative

Patricia Michelle Paborito Ryan (ASIC# 1283193)

Corporate Authorised Representative

Parker Financial Services Pty Ltd
(ASIC# 242984 ABN 88 010 783 285)

About your adviser

Patricia Ryan is a Financial Adviser and sub-Authorised Representative of Parker Financial Services Pty Ltd, which is a Corporate Authorised Representative of Parker Wealth Management Pty Ltd (AFSL# 519344).

Patricia has been in the financial services industry for over nine years, during this time she joined Parker Financial in 2018. She is passionate about delivering the best experience for her clients and creating unique, tailored wealth advice.

Patricia works with clients to help them identify and achieve their financial goals by developing strategic and investment advice, providing high-quality technical support, preparing advice documents and financial modelling. She is knowledgeable in the areas of superannuation, investment and tax planning, and develops solutions with a simple, easy-to-understand approach.

Her education and experience put her in good stead to lead the way for a new generation of advice.

Qualifications

Bachelor of Commerce (Financial Planning Major)
Bachelor of Communication in Advertising
Tier 1 Margin Lending – General Advice
A Financial Planner AFP®

Professional Memberships

Financial Advice Association Australia (FAAA)

Services

Patricia is authorised to provide personal advice and dealing services in the following areas:

- Superannuation and SMSF
- Retirement planning
- Portfolio management
- Personal risk insurance
- Managed investments
- Securities
- Margin lending