



*Effective Financial Solutions*

## Supplementary Financial Services Guide

**Shannon Aspinall**

**Authorised Representative Number 385161**

This document is a Supplementary Financial Services Guide (SFSG) should be read in conjunction with the Balanced Investment Strategies Pty Ltd (BIS) Financial services Guide (FSG).

It gives you details about Shannon's education, experience and authorisations and any other interest or association that may influence Shannon providing you with financial advice. Shannon is an authorised representative of BIS and has been given approval by BIS to distribute this document.

Shannon is highly qualified and has a wealth of experience in both the accounting and financial planning fields. As a financial planner her focus is on providing long term financial planning advice to individuals and trustees of self managed superannuation funds. Aspects covered by this advice may include investment, retirement planning, estate planning, superannuation and insurance.

Shannon joined Balanced Investment Strategies in October 2010 as a Senior Accountant and Financial Planner.

### Education

- **Attainment Of CPA - Financial Planning Specialisation**  
*CPA Australia - awarded 2009*
- **Advance Diploma of Financial Services (Financial Planning)**  
*Kaplan Professional - awarded June 2009*
- **Diploma of Financial Services (Financial Planning)**  
*Kaplan Professional - awarded October 2008*
- **PS 146 Compliance**  
*Securities Institute of Australia - awarded 2004*
- **Certified Practising Accountant**  
*CPA Australia - awarded 2002*
- **Bachelor of Business (Accounting Major)**  
*Griffith University Gold Coast - awarded 2000*

### Experience

- **WHK Horwath Wealth Management**  
Senior Financial Adviser August 2006 to August 2010

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**Balanced Investment Strategies Pty Ltd**

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- **ING Australia (Sydney)**

- Financial Adviser - June 2005 to August 2006

- Relationship Manager Investment Control - Nov 2004 to June 2005

- Senior Financial Accountant Projects - July 2003 to Nov 2004

- Senior Financial Accountant Trust Accounting - July 2002 to June 2003

- Financial Accountant Trust Accounting - May 2001 to June 2002

- **Cosgrove and Co Pty Ltd (Gold Coast)**

- Senior Accountant - January 1997 to March 1998

- **Sedgwick Information Exchanges Ltd, London UK**

- Insurance Accountant - July 1998 to January 1999

## Authorisations

Shannon is authorised by BIS to advise you on the following financial products:

Managed Investment Schemes

Superannuation

Retirement Income Streams

Deposit & Payment Products

Securities

Life Insurance

Loan Facilities

Leasing & Finance

## Remuneration

Shannon is remunerated by a salary and, as a director of Balanced Investment Strategies Pty Ltd and Cosgrove & Co Pty Ltd, may receive a dividend from either company if so determined by the directors.

## Other Interests

Shannon holds interests in:

N/A

If you would like to make an appointment to discuss your financial needs and objectives in more detail, please contact Shannon at Balanced Investment Strategies on 07 5598 3800.