



Adviser Profile

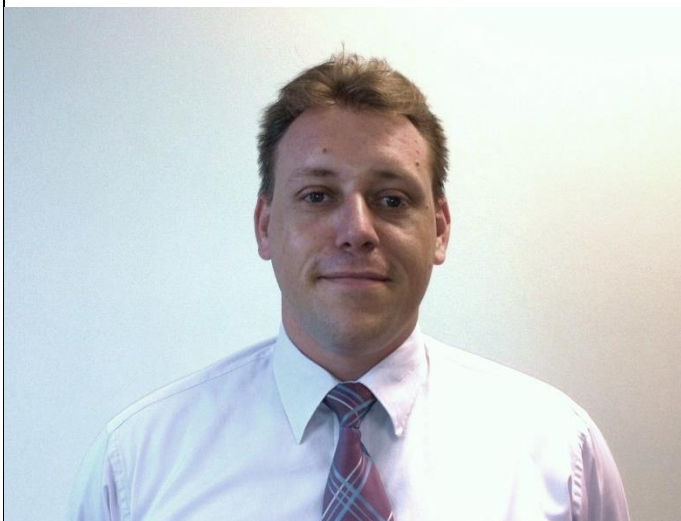
This Adviser Profile is Part 2 of our Financial Services Guide and provides you with further information about your Pareto Group Pty Ltd Authorised Representative.

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James Patterson DipFS (FP)

Square Peg Financial Pty Ltd
Level 1, 99 Bay Street
Brighton Vic 3186
ABN 40 116 262 361

Phone: 1300 612 001
Mob: 0413 561 837
Email: james@squarepegfinancial.com.au
Web: www.squarepegfinancial.com.au



James Patterson is an Authorised Representative of Pareto Group Pty Ltd and is authorised to provide you with advice in the following areas:

- Superannuation
- Deposit and payments products
- Retirement Savings Accounts ('RSA') products
- Life Products, including:
 - o Investment Life Insurance Products
 - o Life Risk Insurance Products

As a group, Square Peg Financial chooses to separate the major areas of financial advice. As such, James specialises in the area of Life Insurance and advises regarding tax effective, personalised strategies aimed at assisting clients to protect themselves, their families and businesses.

James is an employee of the practice and is paid a salary.

Education

James holds a Diploma of Financial Services (Financial Planning).

Experience

James has over 20 year's professional experience in the financial services industry, with a particular focus on insurance product development and claims handling. Starting as a claims officer with a major multi-national insurer and seeing firsthand the financial and emotional reality of underinsurance, James became an Authorized representative specializing in risk insurance for families and small business.

James has been the endorsed life insurance contact for a number of large associations across Australia and believes strongly in association relationships as a way to offer genuine service and independent advice to clients who may otherwise not consider professional financial advice.

Personal

James and Belinda have been married for 17 years and have worked together for much of that time, both in Australia and overseas. They have 2 sons, Spencer and Miles.

James Patterson

Authorised Representative Number 267399
Square Peg Financial Pty Ltd Corporate Authorised Representative 1283463
Pareto Group Pty Ltd
ABN 11 155 278 078 and AFSL 418700

