



**Tasmanian
Perpetual
Trustees**

Financial Planner Profile

Tasmanian Perpetual Trustees Limited certifies that Jaime Donaldson complies with the competency standards required by ASIC as set out in Policy Statement 146.

Jaime Donaldson AFPA, Adv DipFS (FP)
Representative
Tasmanian Perpetual Trustees Limited (TPTL)

Jaime Donaldson has been involved in the financial planning profession since 1999, and has been highly awarded by her industry for her skills. Prior to joining TPTL, she worked for a well respected financial planning firm in Launceston.

Jaime has completed the Advanced Diploma of Financial Planning and is an associate member of the FPA. To ensure that she is kept up-to-date with the latest trends and developments in financial planning, Jaime attends various training courses conducted by us and also by other external providers within Australia.

Jaime is available to provide clients with valuable advice on a range of situations such as pre and post retirement planning, wealth accumulation, risk insurance and gearing strategies.

At TPTL we believe that our financial planners should share our ethics and vision, as well as our passion and empathy for helping clients reach their goals. Jaime is committed to this philosophy, delivering valuable financial solutions to our clients. As an integral part of the team, Jaime has the support and resources necessary to help you take better control of your financial future. We are confident that Jaime can deliver long term solutions to help you reach your financial goals.

Contact details

Address: 23 Paterson Street LAUNCESTON TAS 7250

PO Box 1002 LAUNCESTON TAS 7250

Phone: 03 6348 1122

Email: jaimedonaldson@tptl.com.au

Adviser Remuneration

As your Financial Planner, Jaime is personally remunerated by salary and in addition she has the opportunity to earn incentives or performance based bonuses from TPTL. These incentives/bonuses are based on achieving TPTL service standards and business targets whilst meeting strict compliance requirements. These TPTL incentives and bonuses vary from time to time.

Jaime, as your Financial Planner, receives no direct fees or commissions as a result of the recommendations she provides.

TPTL and our Financial Planners have elected not to receive any material form of alternative remuneration from fund managers or platform providers.

Fees & Commissions

As a result of any recommendations made by Jaime, TPTL may receive payments, commissions, fees or benefits as outlined in our Financial Services Guide (FSG).