

Financial Planner Profile

John Carey BSc, DipFP AFP

Representative

Tasmanian Perpetual Trustees Limited (TPTL) & MyState Financial Limited (MSF)

John Carey has been involved in the financial planning profession since 2001, following an extensive period with Centrelink as a Financial Information Service Officer.

John is a current employee of MyState Financial where he holds the position of Financial Planner. He is a Representative of both TPTL and MSF but in this instance, TPTL is responsible for any advice he provides.

John is able to provide valuable advice on a range of matters such as pre and post retirement planning, wealth accumulation including gearing strategies, direct shares, tax minimization and risk insurance.

John exceeds Industry and Regulatory competencies having completed the Diploma of Financial Planning. John is an associate member of the Financial Planning Association (FPA).

To ensure that he is kept up-to-date with the latest trends and developments in financial planning, John attends various training courses conducted by us and also by other external providers within Australia.

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. John is committed to this philosophy, delivering valuable financial solutions to our clients.

As an integral part of the team, John has the support and resources necessary to help you take better control of your financial future. We are confident that John can deliver long term solutions to help you reach your financial goals.

Contact details

Appointments: TPTL, 21 Reibey Street, Ulverstone
MyState Financial, 49 Wilson Street, Burnie
53 Best Street, Devonport

Phone: 03 6233 0651

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Adviser Remuneration

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

John, as your Financial Planner, receives no direct fees or commissions as a result of the recommendations he 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 John, TPTL may receive payments, commissions, fees or benefits as outlined in our Financial Services Guide (FSG).

