

ADVISER PROFILE

This adviser profile should be read with the Financial Services Guide.

Hayden White

Hayden has been involved in the financial planning industry since 2001. He has been a part of Cotton Tree Financial Services (formerly Poole and Partners) for over 10 years. Hayden has extensive knowledge and expertise in providing clients with direct equity investment advice, superannuation, personal investment and all other areas of financial planning. He is a specialist in all forms of Life insurance products, keyperson and Buy/Sell insurance.

Hayden is a highly motivated adviser who is passionate about building strong partnerships with his clients and helping them to achieve financial security. Hayden believes open communication and well set expectations on both sides are critical in his client relationships.

Qualifications & Memberships

Hayden has a Diploma of Financial Planning, Certificate IV in Finance and Brokering and is a certified small to medium enterprise (SME) Insurance specialist. Hayden has completed the financial adviser exam. Hayden is a Practitioner Member of the Association of Financial Advisers #1381868.

Authorisations

Hayden is authorised to provide advice and deal in the following financial products

- Provide Financial product advice, Deposit and payment Products
- Life Products, Investment Life Insurance Products and Life risk Insurance products
- Retirement Savings Account Products
- Securities
- Superannuation
- Managed Investment Schemes

How Hayden is Paid

Hayden is a salaried employee of Poole and Partners Investment Services Pty Ltd. His remuneration is not aligned to the recommendations of any particular investment or life insurance product or product issuer.



1/33 Sixth Avenue
Maroochydore, QLD 4558



07 5450 9898
PO Box 329, Buddina QLD 4575



hayden@cottonreefinancial.com.au



www.cottonreefinancial.com.au

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FQAA FINANCIAL ADVICE
ASSOCIATION
AUSTRALIA

ADVICE PRACTITIONER

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Advice Fees and Charges

Fees and charges are outlined in the FSG under “Our Fees” and will be disclosed in the advice document at the time of providing advice.

Service Standards

Hayden works closely with Accountants to service insurance, superannuation and direct equity needs and provide specialist advice regarding structure/ownership, product/policy definitions and direct investment options. Advice regarding Key Person, Buy/Sell partnership agreements and Loan Guarantor insurance is also part of his service.

The initial and ongoing service is a priority for all clients and something Hayden prides himself on. As an additional service Hayden assists clients with the initial claim process for Insurance claims. By handling claims internally with our Claims Management Service, it takes the time and stress off you to ensure you can concentrate on getting better.

Reviews are provided for all superannuation and direct investments accounts as per the agreed service agreement. All advice provided is impartial and in your best interest as Hayden and Cotton Tree Financial Services are not aligned with any insurance companies or financial institutions.

