

## ADVISER PROFILE

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



### Kirk Jarrott

Kirk is the Owner of Cotton Tree Financial Services; he began his career as an Accountant in 1996 and moved to Investment Services in 2000 as a stockbroker for 3 ½ years. Kirk headed up the Investment division of Poole and Partners Investments in 2003. Kirk's determination to build long lasting relationships with his clients is as much a priority as his ambition to develop a strategic financial plan that is secure and attainable. Ensuring clients are engaged and empowered is at the heart of Kirk's approach to delivering financial advice outcomes. Kirk has vast practical and technical knowledge to provide his clients with direct equity investments, investments through Self-Managed Funds and estate and retirement planning.

Kirk's main service proposition has been to look after his clients through the various tax structures and linking them with other professionals to ensure their lifestyle and wealth can be passed down to future generations.

Being family focused Kirk is able to provide a broad range of services to his clients. He measures his success over time, by the longevity of his relationships and overall positive impact for his clients.

#### Qualifications & Memberships

Kirk has a Bachelor of Commerce, Associate Degree in Commerce, Diploma of Financial Planning, Certificate IV in Finance and Mortgage Broking. Kirk has completed the unit 'Ethics and Professionalism in Financial Advice' and completed the financial adviser exam. Kirk is a Practitioner Member of the Association of Financial Advisers #1382606.

#### Authorisations

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

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



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**FQAA** FINANCIAL ADVICE  
ASSOCIATION  
AUSTRALIA

**ADVICE PRACTITIONER**

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### **How Kirk is Paid**

Kirk 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.

### **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.

