

Financial Planner Profile



**Tasmanian
Perpetual
Trustees**

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

Ellen Burn DFS (Financial Planning)

Representative

Tasmanian Perpetual Trustees Limited (TPTL)

Ellen has a life long rural background. She has been involved in the financial planning profession since 1993 as a self employed principal of her own Financial Planning Practice for 14 years based at Burnie and covering the North West and West coasts and King Island. She commenced her career with TPTL in July 2007 and is employed as a Financial Planner.

Ellen has specialised in Personal Risk Insurance and Superannuation along with Retirement Planning and Investments. She is an Associate member of the FPA and the AFA. To ensure that she is kept up-to-date with the latest trends and developments in financial planning, Ellen attends various training courses conducted by us and also by other external providers within Australia.

Ellen 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. Ellen is committed to this philosophy, delivering valuable financial solutions to our clients. As an integral part of the team, Ellen has the support and resources necessary to help you take better control of your financial future. We are confident that Ellen can deliver long term solutions to help you reach your financial goals.

Contact details

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Adviser Remuneration

As your Financial Planner, Ellen 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.

Ellen, 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 Ellen, TPTL may receive payments, commissions, fees or benefits as outlined in our Financial Services Guide (FSG).