

# Financial Planner Profile



**Tasmanian  
Perpetual  
Trustees**

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

## **Leah McRae** DFS (Financial Planning)

Representative

Tasmanian Perpetual Trustees Limited (TPTL)

Leah McRae has been involved with the financial services industry since 2003. Prior to joining TPTL, Leah worked with a major banking institution in the positions of financial planning and personal banking in Victoria and Tasmania.

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

At Tasmanian Perpetual Trustees Limited we believe our financial planners should share our ethics and vision as well as our passion and empathy in helping our clients reach their financial goals.

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

## **Contact details**

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## **Adviser Remuneration**

As your Financial Planner, Leah 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.

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