

Financial Planning Profile



**Tasmanian
Perpetual
Trustees**

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

Roger Colbeck MBA, CFP, DipFP

Representative

Tasmanian Perpetual Trustees Limited (TPTL)

Roger Colbeck has been involved in the financial services industry since 1983 in a career that has expanded through roles as a financial planner and in Practice management. Roger is a current employee of TPTL where he holds the position of Manager, Financial Planning.

Roger provides clients with valuable advice on a range of matters in areas of retirement planning, wealth creation and risk management.

Roger has achieved the designation of Certified Financial Planner™ and is a member of the Financial Planning Association of Australia which combined with completion of the Diploma of Financial Planning enables Roger to advise and deal in financial services products on behalf of TPTL.

At Tasmanian Perpetual Trustees Limited we believe that our financial planners should share our ethics and vision, as well as our passion and empathy in helping our clients reach their goals. Roger is committed to this philosophy, delivering valuable financial solutions to our clients. As an integral part of our team, Roger has the support and resources necessary to help you take better control of your financial future. We are confident that Roger can deliver long term solutions to help you reach your financial goals.

Contact details

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Adviser Remuneration

As your Financial Planner, Roger is personally remunerated by salary and in addition he 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. Roger, 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 Roger, TPTL may receive payments, commissions, fees or benefits as outlined in our Financial Services Guide (FSG).