

# Financial Planner Profile



**Tasmanian  
Perpetual  
Trustees**

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

## **Travis Read** B.Comm DipFP CFP

Representative

Tasmanian Perpetual Trustees Limited (TPTL)

Travis Read has been involved in the financial planning profession since its infancy more than 11 years ago. Prior to joining TPTL Travis worked in Sydney for two of Australia's most respected financial planning firms.

Travis specialises in advice on matters such as retirement and social security planning, investment gearing, direct share investment, tax minimisation and superannuation including defined benefit schemes.

Travis is a Certified Financial Planner, the highest designation issued by the Financial Planning Association in Australia. To ensure that he is kept up to date with the latest trends and developments in financial planning, Travis regularly attends various training courses conducted by us and 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. Travis is committed to this philosophy, delivering valuable financial solutions to our clients. As an integral part of our team, Travis has the support and resources necessary to help you take better control of your financial future. We are confident that Travis 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, Travis 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.

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