

Adviser Profile

Financial Services & Credit Guide

Part 2

1 April 2011



This adviser profile forms part of our Financial Services & Credit Guide and provides you with further information about your Suncorp Financial Services Authorised Representative

Lisa Holland is an Authorised Representative of Suncorp Financial Services Pty Ltd and is authorised to provide you with advice in the following areas:

- Deposit & Payment Products
- Life Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Superannuation
- Credit assistance (excluding broking services)

Lisa Holland Dip FS (FP)

Authorised Representative No: 293240

Credit Reference No: 375986

Corporate Authorised Representative No: 309053

Business Name: Coastal Business Insurance

ABN: 61 881 141 578

Address:

Level 2 / 43-45 Primary School Court
Maroochydore, QLD 4558

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Maroochydore QLD 4558

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Email: lisa.holland@cbinsure.com.au

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Experience

Lisa's specialised area of expertise is personal risk insurance, giving advice to clients in relation to their Life insurance, TPD, Income Protection, Trauma cover and Superannuation needs.

Lisa Holland is the owner and director of Coastal Business Insurance, a boutique Financial Planning and Insurance agency located in the heart of Maroochydore. Lisa spent seventeen years working in banking and financial planning organizations before purchasing an insurance and superannuation agency in 2005. With the help of a fantastic team Lisa has built a dynamic, client centred Financial Planning and Insurance Firm.

As the name suggests, Coastal Business Insurance specialises in offering flexible, personalised insurance and superannuation solutions to clients across the Sunshine Coast.

Clients are offered a range of personal life insurance and superannuation solutions that are individually tailored to meet their needs.

Education

- Diploma of Financial Services (Financial Planning)

Head Office
Suncorp Financial Services Pty Limited
ABN 50 010 844 621 AFSL & ACL No. 229885



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Client Servicing

My practice may be offered exclusive client servicing rights after a period of time if certain conditions are met. These include achieving minimum sales and business retention targets set by Suncorp Financial Services in relation to superannuation, investment funds and insurance products. Specifically, my practice would need to generate new business of at least \$2,000,000 per annum into Suncorp superannuation and investment products, or at least \$50,000 premium per annum into Suncorp insurance products. Furthermore, my practice would have to ensure that 90% of clients retain their investment in Suncorp products (from the date I became a corporate authorised representative of Suncorp Financial Services to the date my practice is offered exclusive client servicing rights).