

Adviser Profile

Financial Services & Credit Guide

Part 2

1 April 2011



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

Tracey Homewood 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)

Tracey Homewood ACII(London) ANZIIF

(Senior Associate) CIP

Authorised Representative No: 311485

Credit Reference No: 375987

Corporate Authorised Representative No: 309053

Business Name: Coastal Business Insurance Pty Ltd

ABN: 61 881 141 578

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Experience

Tracey immigrated to Australia from Zimbabwe in 2004 with her husband and three children.

Her past experience has predominately been in the commercial insurance area however she has more recently branched out into the „Personal Risk“ area.

Tracey believes her best business attribute is “meeting my client“s personal insurance needs in an open, honest and ethical manner”.

Her specialty is catering for the personal insurance needs of Tradesmen. She provides them with a comprehensive range of life and income protection products that allows them to work on the job sites, and protect themselves and their loved ones from financial hardship should the situation arise.

Tracey also extends her expertise to small business, again providing solutions to their business and personal insurance needs.

Education

Tracey has completed studies relevant to her areas of advice and maintains this knowledge via continuing and professional education.

Memberships

Tracey is a member of the:

- Australian and New Zealand Institute of Insurance and Finance Senior Associate CIP
- The Insurance Institute of South Africa
- The Chartered Insurance Institute

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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).