

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

Yvette Crowe 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)

Yvette Crowe CFP® Dip FP

Authorised Representative No: 276765

Credit Representative No: 375972

Corporate Authorised Representative No: 309053

Business Name: Coastal Business Insurance Pty Ltd

ABN: 61 881 141 578

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Experience

Yvette commenced her Financial Planning Career in Sydney in 1987, moving to South East Queensland in 2000.

Yvette specialises in advising the over 55's and retirees, and finds this field particularly challenging as it often involves an all-encompassing strategy combining Income, Growth, Taxation and Centrelink / Veteran Affairs issues.

Yvette also provides advice on wealth accumulation in both the superannuation and non superannuation environment.

Education

Yvette holds the following qualifications:

- CERTIFIED FINANCIAL PLANNER™
- Diploma of Financial Planning

Memberships

Yvette is a member of the Financial Planning Association (FPA) and has the status of CERTIFIED FINANCIAL PLANNER™ professional.

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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).