



Jonathan Rogers

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Qualifications

Bachelor of Economics
Graduate Certificate in Financial Planning
Certified Practising Accountant (CPA)
Ethics and Professionalism in Financial Advice
Margin Lending
Securities

Advice and services I can provide

- Deposit and payment products.
- Debentures, stocks or bonds issued or proposed for issue by a government.
- Life investment or life risk products.
- Interests in managed investment schemes, including Investor Directed Portfolio Services (IDPS or 'Wrap').
- Retirement savings accounts.
- Superannuation.
- Managed Discretionary Account Services
- Listed Securities
- Margin Lending and Gearing Facilities
- Self-Managed Super Funds (SMSFs)

Experience

I have extensive experience in the financial planning industry. I started my career in Financial Planning in 1998 and became a Financial Adviser in 2000.

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