



Nicholas Lloyd

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Qualifications	Graduate Diploma of Financial Planning Ethics and Professionalism in Financial Advice Bachelor of Commerce (Finance & Economics) Bachelor of Chemical Engineering (Honours) Self-Managed Superannuation Fund Adviser Education Program Diploma of Financial Services Accredited Aged Care Professional

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
- Self-Managed Super Funds (SMSF)
- Listed Securities
- Aged Care
- Margin Lending and Gearing Facilities

Experience

I have extensive experience in the financial planning industry. I started my career in Financial Planning in 2006 and became a Financial Adviser in 2007.

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