

# 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



## Scott O'Donnell

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)

## Scott O'Donnell

Adv.Dip FS (FP), B.Bus, M.Com

**Authorised Representative No:** 342739

**Credit Representative No:** 376000

**Corporate Authorised Representative No:** 328216

**Business Name:** Insure QLD Pty Ltd

**ABN:** 42 010 883 913

### Address:

1st Floor, Somerset House  
57 Thomas Drive  
Chevron Island QLD 4217

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**Phone:** 07 5539 9074

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**Web:** [www.insureqld.com.au](http://www.insureqld.com.au)

## Experience

Scott joined the Insure QLD team in late 2009 and has 19 years experience in the Finance Industry.

After completing High School on the Coast, Scott undertook a Bachelor of Business in Accounting and while working in the banking industry completed a Master of Commerce degree.

Scott has an Advanced Diploma of Financial Services (Financial Planning) and is undertaking further Financial Planning qualifications.

Being a Gold Coast local (having moved here with his family in 1976), Scott recognises the importance of ensuring client satisfaction and pays particular attention to the needs of his clients, their commitments, lifestyle and future goals.

Scott's professional qualifications allow him to provide tailored recommendations on life, trauma, income protection and total and permanent disability insurance in addition to superannuation and managed investments.

## Education

- Advanced Diploma of Financial Services (Financial Planning)
- Bachelor of Business (Accounting)
- Master of Commerce

## Memberships

Scott is a current member of the Association of Financial Advisers (AFA).

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



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## Client Servicing

Insure QLD 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).