

# 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



## Terry Dall'Osto

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)

## Terry Dall'Osto

**Authorised Representative No:** 295898

**Credit Representative No:** 375973

**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

PO Box 94

Isle of Capri QLD 4217

**Phone:** 07 5539 9074

**Mobile:** 0423 968 106

**Fax:** 07 5539 9726

**Email:** [terry@insureqld.com.au](mailto:terry@insureqld.com.au)

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

## Experience

Terry joined the insurance industry in 1983 and has had the opportunity to work with major organisations within the industry. As Principal of Insure QLD Pty Ltd, his experience in many facets of the business (including Financial Planning and General Insurance) has provided him with knowledge across a variety of industry sectors.

Terry's true passion is all things related to Risk Insurance and he specialises in Life, Trauma, Total and Permanent Disability and Income Protection Insurance.

Terry works with specialists in the fields of business succession (Buy/Sell agreements) and Estate Planning. He can customise insurance packages to suit business owner's needs, whether it is business or family protection, mortgage/loan protection, key person, buy-sell or superannuation.

Terry recognises the vital role played by a professional adviser in helping clients to protect their business, wealth and financial future.

## Education

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

## Memberships

Terry 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**



GPO Box 1453, Brisbane QLD 4001



13 11 55



[sfsagenciesdirect@suncorp.com.au](mailto:sfsagenciesdirect@suncorp.com.au)

## 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).