Prime

Michelle Bromley CFP®

Director - Strategy & Advice
Private Client Adviser

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Qualifications & Designations

- Certified Financial Planner ®
- Bachelor of Business (Accounting)
- Diploma of Financial Planning
- Kaplan Professional Education Course in Self Managed Superannuation Funds

Expertise

Michelle is authorised to deal in the following financial products:

- ✓ Basic and non-basic deposit products
- ✓ Derivatives
- ✓ Government debentures, stocks or bonds
- ✓ Life products
- ✓ Interests in managed investment
- ✓ schemes, including IDPS
- ✓ Retirement savings accounts
- ✓ Superannuation
- ✓ Securities
- ✓ Standard Margin Lending

Prime Financial Group

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About Michelle

Michelle has held a variety of financial services roles since 1996 within Funds Management, Financial Planning, Wealth Management and Private Banking firms. Michelle has held Certified Financial Planner® status since 2007.

Prior to joining Primestock Securities Ltd, Michelle devised structural and strategic financial advice for High Net Worth clients as part of Credit Suisse Private Banking's Wealth Planning team. Previously, Michelle held both support and advisory roles with UBS Wealth Management and the financial services division of PKF Chartered Accountants.

Michelle's diverse experience enables her to work with clients of varying needs and in conjunction with their other Professional Advisers. Michelle has an in-depth knowledge of wealth accumulation and asset protection enabling her to assist clients with comprehensive strategic and investment advice.

Michelle is a salaried employee and is eligible to receive up to 20% of her base level remuneration in both short-term and long-term bonus incentives. This is on the basis that Michelle meets the objectives set by Primestock Securities which include client services standards, training and compliance, in addition to any financial targets.

Advisory Services

Our financial services are personalised to our clients' needs. We can provide a total financial solution, or alternatively advice can be limited to a particular service or situation, including:

- ✓ Financial & Retirement Planning
- ✓ Wealth Creation, Accumulation & Consolidation
- ✓ Retirement Planning Strategies
- ✓ Investment Advice
- ✓ Life Insurance
- ✓ Superannuation Advice including Self Managed Superannuation Fund (SMSF)
- ✓ Wills & Estate Planning
- ✓ Business Succession Planning
- ✓ Asset Protection
- ✓ Lending & Finance

aspire, innovate, grow & impact