Prime

Livio Caiolfa

Director - Private Client Adviser

T 03 8825 4748 | **M** 0413 448 735
E livioc@primefinancial.com.au

Qualifications & Designations

- Advanced Diploma of Financial Services (Financial Planning)
- Bachelor of Business - Banking, Finance & Accounting
- Kaplan Professional Education Course in Self Managed Superannuation Funds
- Level 1 & 2 Accredited ASX Derivatives Adviser

Expertise

Livio 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

A Level 17, HWT Tower
40 City Road, Southbank VIC 3006
P 1800 064 959
E clientservices@primefinancial.com.au
Prime Financial Group

About Livio

Livio has worked in the Finance industry since 2001 within Financial Planning, Investment Advisory and offshore trustee businesses.

Livio's diverse experience enables him to work with clients of varying needs and in conjunction with their other Professional Advisers. Livio has in-depth knowledge and experience with Self Managed Super Funds.

He also understands the complexities of wealth creation and asset protection along with the transfer of ownership for business owners and families. He is able to assist his clients with comprehensive strategic and investment advice.

Livio works with Primestock Securities Ltd as a contractor and receives a base level remuneration.

He is eligible to receive up to 20% of that payment as a bonus. This can be paid as a short-term or long-term incentive or a combination of both. The bonus incentives Livio can receive are based on both financial and nonfinancial standards set by the firm which include client servicing, training and compliance.

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