Prime

# Jarrod Rodda CFP®

Private Client Adviser

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## Qualifications & Designations

- Master of Financial Planning
- Certified Financial Planner®
- Bachelor of Commerce (Financial
- Planning, Accounting & Finance)
- Diploma of Financial Planning
- Kaplan Professional Education
- Course in Self Managed Super Funds

## Expertise

Jarrod 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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40 City Road, Southbank VIC 3006
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E clientservices@primefinancial.com.au
Prime Financial Group

The Financial Advisory services referred to in this profile are offered by Jarrod Rodda, Authorised Representative No. 1263612. Jarrod is an authorised representative of Primestock Securities Ltd, AFSL 239180 | ACN 089 676 068. Updated August 2025.

## About Jarrod

Jarrod joined Prime back in 2015 and is a Private Client Adviser. He enjoys working with his clients, advising them on areas including wealth management, asset protection, investment and superannuation strategies.

Jarrod followed his passion for comprehensive strategic and investment advice by pursuing further study, completing his Master of Financial Planning whilst also earning his Certified Financial Planner® certification in 2022.

Jarrod's experience and qualifications ensure he is well equipped to help clients meet their financial goals both now and as their situation progresses into the future.

Jarrod is a salaried employee and is eligible to receive up to 20% of his base level remuneration in both short-term and long-term incentives. This is on the basis that Jarrod meets the objectives set by Primestock Securities which includes 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*