



**Pam Bickley** CFP®, Dip FP

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### **Adviser profile**

Pam spent eight years in the Finance Industry in various roles covering sales, risk management and marketing before moving to Financial Planning in 1993.

She has completed the Diploma of Financial Planning, is a Practitioner member of the Financial Planning Association and holds the Certified Financial Planner status which is the internationally recognised symbol of excellence in financial planning. This is awarded as a result of academic study, commitment to ethics and professional experience as a financial planner.

Pam specialises in providing quality portfolio management along with strategic and investment advice for retirees and clients who are working and building their wealth. She works closely with her clients planning for the accumulation and preservation of wealth and the provision of secure, tax effective and social security effective retirement income streams.

Assisted by her friendly staff she provides proactive, responsive client service on an ongoing basis to bring comfort and peace of mind.



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### **Important information**

This Profile should be provided in conjunction and read with the Financial Services Guide, which sets out all other required matter.

As a representative of Prescott Securities, this adviser is authorised in accordance with the policies and procedures of the licensee to provide the specific financial services outlined below:

### **Financial services**

Authorised to provide the following financial services to retail and wholesale clients:

- Provide Financial Product advice
- Deal in a Financial Product – by applying for, acquiring, varying or disposing of a financial product on behalf of another person in respect of the following classes of products:

### **Financial products**

- Deposit and payment products, including;
  - basic deposit products;
  - deposit products other than basic deposit products; and
  - non-cash payment products;
- Debentures, stocks or bonds issued or proposed to be issued by a government;
- Life products including:
  - investment life insurance products;
- Interests in managed investment schemes including investor directed portfolio services;
- Retirement savings accounts products (within the meaning of the Retirement Savings Account Act 1997);
- Securities;
- Standard margin lending facility;
- Superannuation.

