



JULIE SHERWOOD

Principal - Financial Services

Phone 02 6763 0100

Fax 02 6766 8538

Mobile 0447 350 168

Email jsherwood@forsyths.com.au

**Level 3, 201 Marius Street,
PO Box 758, Tamworth NSW 2340**

Julie Sherwood is a Representative (number 335525) of Forsyths Financial Services (Forsyths) and is authorised to advise and to arrange and deal in financial service products on behalf of Forsyths.

Julie has over 15 years' experience in financial services, having worked in the industry since 2003 with leading financial institutions including Commonwealth Financial Planning, Charter Financial Planning and AXA/AMP. Julie joined Forsyths in 2011.

Julie's areas of expertise include:

- Strategic planning for wealth creation and wealth protection, portfolio construction and advice
- Superannuation and retirement planning
- Self-Managed Superannuation Funds (SMSFs)
- Aged Care Strategies

Julie is authorised by Forsyths to provide financial product advice to both retail and wholesale clients under Forsyths Australian Financial Services License. She is not authorised to provide services in the areas of general insurance or mortgage broking.

Julie is a member of the Financial Planning Association of Australia (FPA) and the Self-Managed Super Fund Association (SMSF Association). Julie has the following qualifications:

- Diploma Financial Planning (Deakin University)
- Diploma of Financial Services - Financial Planning (Pinnacle)
- Self-Managed Superannuation Funds Accreditation (Kaplan)
- Margin Lending and Geared Investments Accreditation (Kaplan)
- Diploma of Frontline Management (NSW VETAB)
- Accredited SMSF Specialist Adviser™ through the Self-Managed Super Fund Association (SMSF Association)

Remuneration

Payments to Forsyths advisers are in the form of salary. They may also receive bonuses or benefits based on employment and internal performance criteria linked to compliance, training and business targets. Where Forsyths advisers are also Firm Principals, their remuneration package includes dividends paid by Forsyths, linking their income to the overall profitability of the firm. Forsyths advisers do not receive commissions or other benefits from product providers either direct to them or through our business.

Forsyths have offices in Armidale, Coonabarabran, Gunnedah, Tamworth and Inverell. To arrange an appointment today, please contact Julie Sherwood on 02 6763 0100, or email planners@forsyths.com.au.

Date: 4 May 2018.