

FINANCIAL ADVISER PROFILE



Who is my Adviser?

Ed Leuenberger Pty Limited T/As EWL & Associates is a Corporate Authorised Representative of Matrix Planning Solutions Limited. Their details are below:

Ed Leuenberger Pty Limited T/As EWL & Associates

ASIC AR No. 247492 | ABN No. 28 002 557 039

Business Address: Suite 3.01, 247 Coward Street, MASCOT NSW 2020

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Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, EWL & Associates Pty Ltd offers you a wide range of services to assist you in planning towards achieving your financial goals. We are committed to providing you with the highest level of advice by offering you a complete solution to your needs and have authorised the individuals listed below to provide you with general and personal financial advice as well as credit assistance.

Ed Leuenberger

Adviser Qualifications & Memberships

Ed Leuenberger is an Authorised Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- RG 146 Compliant
- Justice of the Peace (JP)

His Australian Securities and Investments Commission (ASIC) Authorised Representative number is 247610.



Ed is the Director of EWL & Associates Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.

Darren Frawley

Adviser Qualifications & Memberships

Darren Frawley is an Authorised Representative and Credit Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- CERTIFIED FINANCIAL PLANNER™
- Bachelor of Economics (Australian National University)
- Certificate IV in Finance and Mortgage Broking
- Fellow of the Financial Services Institute of Australasia

His Australian Securities and Investments Commission (ASIC) AR and Credit Representative numbers are: 247570 and 368862 respectively. Darren is an employee of EWL & Associates Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.



EWL & Associates Pty Ltd provides financial advice in the following areas:

- Personal and Corporate Superannuation
- Pre Retirement Planning & Retirement Planning
- Personal Life Insurance (Life, Total & Permanent Disablement, Trauma, Income Protection)
- Business Life Insurance (Key Man, Business Expenses, Buy Sell)
- Saving / Investment Plan
- Debt Management
- Estate Planning



Matrix Planning Solutions' Credit Representatives are also able to provide Credit Assistance advice in relation to loans regulated by the National Consumer Credit Protection Act.

Matrix has also accredited Darren to provide advice in the following additional product area:

- Margin Lending / Gearing
- Self Managed Superannuation Funds
- Shares

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on 02 9317 2477. Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.

What types of Financial Products is Matrix authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:
 - Managed investments including investor directed portfolio services
 - Superannuation
 - Retirement savings accounts (RSA)
 - Debentures, stocks or bonds issued or proposed by governments
 - Basic and other deposit products
 - Securities
 - Life products including investment and risk
 - Standard Margin Lending Facilities
 - Credit Assistance

If you do not wish to receive advice, Ed or Darren may deal on your behalf by carrying out your instructions. If you do not obtain advice, you face the risk that the Financial Product/s you select may not fully take into account your objectives, financial situation or needs.

Matrix Planning Solutions Limited is responsible for the financial services provided including the distribution of this Financial Services & Credit Guide (FSG/CG).

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