

Adviser Profile

Date prepared: 15th December 2023 – Philip McCoy - Profile Version 1a.0

This document forms Part B of this Financial Services and Credit Guide and must be read together with Part A – Practice Profile.

About Philip McCoy

Philip McCoy is an Authorised Representative (AR number 248135) and Credit Representative (CR number 373136) of the Licensee.

Contact details

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Advice and services I can provide

I am authorised to provide the services listed in the Our advice and services section of this Guide.

In addition to the areas listed in that section, I can also advise on:

- Margin lending facilities
- Self-managed super funds
- Aged Care
- Derivatives (Limited to advising on and dealing in derivative-related products approved by the Licensee)

How am I paid?

I am an employee of Invest Blue and receive a salary and a potential bonus from Invest Blue. Any potential bonus paid is based on meeting individual key performance indicators and the overall profitability of our practice.