

Adviser Profile

Date prepared: 15th December 2023 - Adam Penman - 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 Adam Penman

Adam Penman is an Authorised Representative (AR number 1234408) and Credit Representative (CR number 479334) of the Licensee.

Contact details

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| Address | 29 Darling Street TAMWORTH NSW 2340 |
| Phone | 1300 346 837 |
| Email | Adam_Penman@investblue.com.au |

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

How am I paid?

I am an employee and shareholder 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.