

# Alan Tate



## Financial Planner Profile

### Qualified Professional

Alan's qualifications include:

- Advanced Diploma of Financial Planning [Adv Dip FP]
- Post Graduate Commerce
- Currently completing his Master's in Business Administration [MBA]
- Judicial Commissioner of Oaths - NT [JCFO-NT]

### Extensive Experience

Alan has been in the financial services industry since 2004 and has been a practicing Senior Financial Planner since 2006.

Alan moved to Darwin in 1999 and has a good understanding of life in the Northern Territory, as well as the culture and regions.

### Specialist Product Advice

Alan is authorised to provide you with financial product advice and deal in the following financial products:

- Deposit accounts (bank accounts and term deposits)
- Managed investments
- Retirement products
- Life insurance

This profile is to be read in conjunction with the Financial Services Guide of MyLife MyAdvice.



Alan Tate is an employee of MyLife MyAdvice and an Authorised Representative of CSF Pty Limited.

**Authorised Representative number**

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