

# Matthew Kalz



## Financial Planner Profile

### Qualified Professional

Matt is a member of the Financial Planning Association and his qualifications include:

- Diploma of Financial Planning [Dip FP]

### Extensive Experience

Matt has been employed in the financial services industry for over 40 years, with 24 of those specifically as a Financial Planner.

He has extensive experience in advising clients in regards to superannuation and retirement planning (including Centrelink), and has worked within accounting practices, banking and member service organisations, including time with VicSuper in country Victoria.

Matt commenced working with MyLife MyAdvice as a Financial Planner in July 2012.

### Specialist Product Advice

Matt 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.



Matthew Kalz is an employee of MyLife MyAdvice and an Authorised Representative of CSF Pty Limited.

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