

Financial Planner profile

MyLife MyAdvice Financial Planners do not receive commissions or bonuses, so they will always have your best interest at heart. Your first meeting is completely free, and there is no obligation to continue with advice.

Extensive experience

Ian has been employed in the financial services industry as a financial planner since 1999 and specialises in the area of superannuation and retirement planning. Prior to joining MyLife MyAdvice Ian has previously worked in an accounting firm, run his own financial planning practice and provided financial planning advice for an industry super fund so he understands the philosophy of putting the member first. Ian has been employed with MyLife MyAdvice as a financial planner since June 2012.

Ian can help you

- understand and meet your lifestyle and financial goals
- understand age pensions and other Centrelink issues
- protect you and your family with personal insurance cover
- maximise your retirement savings with tax effective strategies
- create strategies for saving for your first car, home, or investment property
- manage debt more effectively
- understand aged care
- understand estate planning
- monitor and update your financial plan as required by your changing lifestyle and personal circumstances

Qualified professional

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

- Certified Financial Planner [CFP]
- Diploma of Financial Planning [Dip FP]
- Accredited Aged Care Professional

This profile should be read in conjunction with the MyLife MyAdvice Financial Services Guide.

Specialist product advice

Ian is authorised to provide you with financial advice in regards to:

- Superannuation
- Managed investments
- Retirement products
- Insurance cover
- Deposit accounts



Ian McRae is an Authorised Representative of CSF Pty Limited.

Authorised Representative number: 277138

Address:
St Brigid's Centre
60 John Street
Northbridge WA 6003

Postal address:
PO Box 132
Northbridge WA 6865

Phone:
08 6242 3151

Email:
imcrae@mylifemyadvice.com.au