

FINANCIAL ADVISER PROFILE

GRAVITAS
FINANCIAL



Gravitas Financial Pty Ltd is a Corporate Authorised Representative of Matrix Planning Solutions Limited. Their details are below:

Gravitas Financial Pty Ltd

ASIC AR No. 001256737 | ABN No. 50 617 429 802

Business Address: 37 Australia Avenue, Matraville, NSW, 2036

Postal Address: Po Box 44, Matraville NSW 2036

T: 0415 998 225

E: advice@gravitasfinancial.com.au

W: www.gravitasfinancial.com.au

Business Profile

As a Corporate Authorised Representative of Matrix Planning Solutions Limited, Gravitas Financial Pty Ltd offers you a wide range of services to assist you in planning towards achieving your financial and personal goals. We are committed to providing you with the highest level of advice by offering you a complete solution to your needs and have authorised the individuals listed below to provide you with general and personal financial advice

Grant David Levitas

Adviser Qualifications & Memberships

Grant is an Authorised Representative of Matrix Planning Solutions Limited. His educational qualifications and membership of Professional Associations are:

- Advanced Diploma in Financial Planning
- Diploma of Financial Services (Financial Planning)
- Certificate IV Mortgage Broking and Finance
- Member of the Financial Planning Association

His Australian Securities and Investments Commission (ASIC) AR number is 1001667. Grant is a Director of Gravitas Financial Pty Ltd which is a principal agreement holder and Corporate Authorised Representative of Matrix Planning Solutions Limited.

Gravitas Financial Pty Ltd provides financial advice in the following areas:

- Personal and Corporate Superannuation
- Pre-Retirement Planning & Retirement Planning
- Portfolio Construction and Management
- Personal Life Insurance (Life, Total & Permanent Disablement, Trauma, Income Protection)
- Business Life Insurance (Key Man, Business Expenses, Buy Sell)
- Saving / Investment Plan
- Cash Flow and Debt Management
- Estate Planning

Matrix Planning Solutions' Credit

Representatives are also able to provide Credit Assistance advice in relation to loans regulated by the National Consumer Credit Protection Act.

What types of Financial Products is Matrix authorised to provide advice on?

- Provide general advice and personal advice
- Arrange to deal in financial products by applying for; acquiring, varying or disposing of the following financial products:
 - Managed investments including investor directed portfolio services
 - Superannuation
 - Retirement savings accounts (RSA)
 - Debentures, stocks or bonds issued or proposed by governments
 - Basic and other deposit products
 - Securities
 - Life products including investment and risk
 - Standard Margin Lending Facilities
 - Credit Assistance

If you do not wish to receive advice, Grant may deal on your behalf by carrying out your instructions. If you do not obtain advice, you face the risk that the Financial Product/s you select may not fully take into account your objectives, financial situation or needs.

Matrix Planning Solutions Limited is responsible for the financial services provided including the distribution of this Financial Services & Credit Guide (FSG/CG).

Matrix Planning Solutions Limited (ABN 45 087 470 200)
Australian Financial Services and Australian Credit
Licensee License No. 238256

If you have any further questions about the financial services Matrix Planning Solutions Limited provides, please contact our office on 02 8075 1300. Please retain this document for your reference. It may assist you when you deal with Matrix Planning Solutions Limited in the future.