



BEN LOCKWOOD

Financial Adviser

Phone 02 6763 01

Fax 02 6766 8538

Email blockwood@forsyths.com.au

Level 3, 201 Marius Street,
PO Box 758, Tamworth NSW 2340

Ben Lockwood is a Representative (number 318369) of Forsyths Financial Services (Forsyths) and is authorised to advise and to arrange and deal in financial service products on behalf of Forsyths.

Ben has over 12 years' experience in financial services, having worked in the industry since 2007 with publically listed and private advisory firms including WilsonHTM and Elston.

Ben joined Forsyths in 2016 and his areas of expertise include:

- Strategic planning for wealth creation and wealth protection, portfolio construction and advice
- Superannuation and retirement planning
- Self-Managed Superannuation Funds (SMSFs)

Ben is authorised by Forsyths to provide financial product advice to both retail and wholesale clients under Forsyths Australian Financial Services Licence. He is not authorised to provide services in the areas of general insurance or mortgage broking.

Ben has the following qualifications:

- Bachelor of Finance (Jacksonville University, USA)
- Masters of Accounting (University of Southern Queensland)
- Advanced Diploma Financial Planning (Kaplan)
- Self-Managed Superannuation Funds Accreditation (Kaplan)
- Margin Lending and Geared Investments Accreditation (Kaplan)
- Accredited Derivatives advisor (Level 1) (Kaplan)

Remuneration

Payments to Forsyths staff members are in the form of salary. Staff may also receive bonuses or benefits based on employment and internal performance criteria linked to compliance, training and business targets. Where Forsyths financial advisers are also firm Principals, their remuneration package includes dividends paid by Forsyths, linking their income to the overall profitability of the firm. Neither staff nor firm Principals receives commissions or other benefits from product providers direct to them or through our business.

Forsyths have offices in Armidale, Coonabarabran, Gunnedah, Tamworth and Inverell. To arrange an appointment today, please contact Ben Lockwood on 02 6763 0100, or email planners@forsyths.com.au.

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