

ROPAN



Jon Grant

Authorised
Representative
No. 239267

Financial Advisor



Education

Diploma of Financial
Planning

Advanced Diploma of
Financial Planning

Certificate of ASX Securities

Certificate of Self Managed
Superannuation Funds

Certified Financial Planner®

Memberships

Financial Planning
Association of Australia

Fees

For full details of fees I may
charge or receive, please refer
to my Financial Services
Guide.

The driving passion behind the establishment of my own business, World Assets, is creating mutually rewarding relationships. I enjoy working one on one with people in lasting relationships, and being partners in wealth management over the long term is a great way of contributing positively to the lives of 'busy' successful professionals. A key focus of World Assets is that it remains sufficiently small in client numbers to ensure my personal focus is never lost.

Working in the financial industry for over 15 years has allowed me to experience many aspects of financial advice, and from this I have developed my business to specifically advise on direct shares, listed property trusts, bonds and cash.

ACN 096 682 049
ABN 500 966 820 49

Licenses
ACN 142 675 278
ABN 120 179 602 52

Australian Financial
Services Licensee
No. 353 890

ROPAN Financial
Services Group

29 Breed Street / PO Box 139
Traralgon Victoria 3844

Telephone 03 5174 6755
Facsimile 03 5174 6799

info@ropan.com.au
www.ropan.com.au

Areas of Authorisation

Investments

Basic Deposit Product	●	Investment Bonds	●
Managed Investments	●	Direct Shares	●
Debentures	●	Margin Lending / Gearing	●

Superannuation & Retirement Planning

Self Managed Superannuation	●	Employer Sponsored Superannuation	●
Annuities	●	Account Based Pensions	●
Corporate Superannuation	●	Retirement Savings Accounts	●
Personal Superannuation	●		

Risk Insurance

Insurance within Superannuation	●	Life / Term Insurance	●
Total & Permanent Disability Insurance	●	Key Man Insurance	●
Income Protection Insurance	●	Business Expense Insurance	●
Trauma Insurance	●		

Benefits, Incentives, Interests and Associates

I Jon Grant am an authorised representative of
ROPAN Licensees Pty Ltd.

Neither I, nor ROPAN Licensees Pty Ltd retain any shares in any company that could be capable of, or might reasonably be seen to be capable of influencing me in the provision of my advice.

I Jon Grant and ROPAN Licensees Pty Ltd may receive sponsorship and non-cash benefits in relation to certain financial products that I may recommend.

Currently, I Jon Grant and ROPAN Licensees Pty Ltd do not receive any soft dollar benefits from, and have no material interest in, or associations with any issuers of financial products that may be capable of, or might reasonably be expected to be capable of influencing my advice.

ROPAN Licensees Pty Ltd may receive sponsorship throughout a financial year where actual costs are incurred however, it has no ongoing sponsorship relationship in place.

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