

ROPAN



Romi Bitar

Authorised
Representative
No. 242328

CFP® & LRS® & B.Bus (FP) & Dip Bus
Senior Financial Planner

Education

Bachelor of Business
(Financial Planning) *RMIT*

Certified Financial Planning
post graduate course
Deakin University

Life Risk Specialist
FAAA

Aged Care specialist
Aged Care Steps

Self-Managed Superannuation
Funds *Kaplan Professional*

Margin Lending & Geared
Investments *Kaplan Professional*

Graduate Diploma in
Accounting *East Gippsland TAFE*

Tax (Financial Adviser)
Tax Practitioners Board

Qualified Real Estate Agent

Memberships

Financial Advice Association
Australia (*FAAA*)

Fees

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

Romi is a Certified Financial Planner (CFP®) and Life Risk Specialist with more than 26 years' experience in financial planning. Prior to joining ROPAN, he successfully owned and operated his own financial planning practice for 20 years.

Romi provides strategic financial advice across superannuation and retirement planning, Self-Managed Superannuation Funds and risk management.

He is also an accredited Aged Care Professional™ and holds a Bachelor of Business in Financial Planning and an Associate Diploma in Accounting.

Outside of ROPAN, Romi enjoys coaching and mentoring within the soccer community.

ROPAN Financial
Planning Group

Traralgon, Bairnsdale,
Bendigo & Geelong

29 Breed Street / PO Box 139
Traralgon Victoria 3844

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Version 2
09.2026

Incorporating
financial solutions 

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

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, Romi Bitar, am an authorised representative of ROPAN Licensees Pty Ltd.

Neither I, Romi Bitar, 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.

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