



**Helen Dundon** B Acc, CPA (FPS)

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### **Adviser profile**

Helen has a clear goal for her clients - making sure that their wealth is best structured to ensure their ongoing financial independence.

A CPA with a specialisation in financial planning, Helen spends time with every one of her clients ensuring that the strategies currently meet, and continue to meet, the individuals specific goals.

For those of her clients that are retired, Helen works with them to ensure that their spending level is well matched to their income, so that they can enjoy their retirement without the need to worry about their income streams.

Helen enjoys both the personal and technical aspects of her work, which has seen her develop a solid client base with a strong emphasis on business professionals.

In addition to her Adelaide client base, Helen has many clients in McLaren Vale which she enjoys working closely with in the fulfilment of their objectives.



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### **Important information**

This Profile should be provided in conjunction and read with the Financial Services Guide, which sets out all other required matter.

As a representative of Prescott Securities, this adviser is authorised in accordance with the policies and procedures of the licensee to provide the specific financial services outlined below:

### **Financial services**

Authorised to provide the following financial services to retail and wholesale clients:

- Provide Financial Product advice
- Deal in a Financial Product – by applying for, acquiring, varying or disposing of a financial product on behalf of another person in respect of the following classes of products:

### **Financial products**

- Deposit and payment products, including;
  - basic deposit products;
  - deposit products other than basic deposit products; and
  - non-cash payment products;
- Life products including:
  - investment life insurance products;
- Interests in managed investment schemes including investor directed portfolio services;
- Securities;
- Standard margin lending facility;
- Superannuation.

