



*Effective Financial Solutions*

## **Supplementary Financial Services Guide**

**Darin Trounce**

**Authorised Representative Number 123 6910**

This document is a Supplementary Financial Services Guide (SFSG) should be read in conjunction with the Balanced Investment Strategies Pty Ltd (BIS) Financial services Guide (FSG) dated April 2015.

It gives you details about Darin's education, experience and authorisations and any other interest or association that may influence him in providing you with financial advice. He is an authorised representative of BIS and has been given approval by BIS to distribute this document.

Darin has been working in the financial services industry since July 2015 when he joined Balanced Investment Strategies. He has completed his Diploma of financial Services and has just started the final subject of the Advanced Diploma.

Darin has experience as an administrator and is responsible for much of the financial planning compliance documentation that is produced by Balanced Investment Strategies.

### **Education**

- **Advance Diploma of Financial Services (Financial Planning)**

*Investment Banking Institute – in progress*

- **Diploma of Financial Services (Financial Planning)**

*Investment Banking Institute – awarded March 2015*

- **Bachelor of Commerce**

*University of Otago – awarded May 2010*

- **Diploma for Graduates (Endorsed in Accounting)**

*University of Otago – awarded May 2010*

### **Experience**

- **Balanced Investment Strategies**

Financial Planner since December 2015

Financial Planning Administrator from July 2015 to December 2015

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**Balanced Investment Strategies Pty Ltd**

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## Authorisations

Darin is authorised by BIS to advise you on the following financial products:

Managed Investment Schemes	Superannuation
Self Managed Superannuation Funds	Retirement Income Streams
Deposit & Payment Products	Securities
Loan Facilities	Leasing & Finance
Life Insurance	

## Remuneration

Darin is remunerated by a salary and may receive bonuses from time to time based on the overall performance of BIS.

## Other Interests

Darin has the following financial interests:

- A direct share portfolio
- Colonial First State managed funds:
  - Wholesale geared growth plus
  - Wholesale property index
- Intrust Super account

If you would like to make an appointment to discuss your financial needs and objectives in more detail, please contact Darin at Balanced Investment Strategies on 07 5598 3800.