Prime

Nicole Lewis CFP®

PRIVATE CLIENT ADVISER

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Qualifications & Designations

- Certified Financial Planner ®
- Bachelor of Commerce
- Diploma of Financial Planning
- Kaplan Professional Education Course in Self Managed Superannuation Funds

Expertise

Nicole is authorised to deal in the following financial products:

- ✓ Basic and non-basic deposit products
- ✓ Derivatives
- ✓ Government debentures, stocks or bonds
- ✓ Life products
- ✓ Interests in managed investment schemes, including IDPS
- ✓ Retirement savings accounts
- ✓ Superannuation
- ✓ Securities
- ✓ Standard Margin Lending

Prime Financial Group

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in Prime Financial Group

The Financial Advisory services referred to in this profile are offered by Nicole Lewis, Authorised Representative No. 1240164. Nicole is an authorised representative of Primestock Securities Ltd (Primestock), AFSL 239180 | ACN 089 676 068. Updated July 2021.

About Nicole

Nicole has been involved in the financial services industry since 2014. After successfully completing a Bachelor of Commerce at Deakin University and a Diploma in Financial Planning, she began with Prime as a Client Services Representative.

After moving to an Associate Adviser role in 2016, Nicole has further progressed her career, becoming a Private Client Adviser in 2019.

With a strong interest in investments, her focus is to provide clients with comprehensive strategic and investment advice to help them achieve their lifestyle and financial goals.

Nicole has since furthered her knowledge by completing a course in Self-Managed Super Funds, as well as achieving the Certified Financial Planner® designation.

Nicole is a salaried employee and is eligible to receive up to 20% of her base level remuneration in both short-term and long-term bonus incentives. This is on the basis that Nicole meets the objectives set by Primestock which include client services standards, training and compliance, in addition to any financial targets.

Advisory Services

Our financial services are personalised to our clients' needs. We can provide a total financial solution, or alternatively advice can be limited to a particular service or situation, including:

- ✓ Financial & Retirement Planning
- ✓ Wealth Creation, Accumulation & Consolidation
- ✓ Retirement Planning Strategies
- ✓ Investment Advice
- ✓ Life Insurance
- ✓ Superannuation Advice including Self Managed Superannuation Fund (SMSF)
- ✓ Wills & Estate Planning
- ✓ Business Succession Planning
- ✓ Asset Protection
- ✓ Lending & Finance

aspire, innovate, grow