



ADVISER PROFILE

**Stephen Weinstein - Authorised Representative
Number 249513**

**Rolanda Adams Financial Services Pty Limited | CAR
No.320236**

PROFILE

I am a Certified Financial Planner professional with over 20 years of financial planning experience. I provide a clear understanding of current financial status, future goals, and the steps needed to reach those objectives.

CONTACT

**PO Box 996
Double Bay NSW 1360**

Mobile: 0439 986 736

Email:
stephen@rolandaadams.com.au

Web:
<https://www.rolandaadams.com.au/>

EDUCATION

- Advanced certificate in accounting
- Diploma of Financial Markets
- Diploma of Financial Planning – Gaining Certified Financial Planning (CFP)
- Accreditation - Self Managed Superannuation Funds
- Accreditation – ASX Listed Product Training Course
- Accreditation – Age Care Advised
- Completion of FASEA Standard Authority

I hold the following memberships:

Financial Advice Association of Australia (FAAA)

Authorisations

I am authorised in the following financial services and products:

Superannuation

Pensions and Annuities

Self-Managed Superannuation Funds

Cash and Term Deposits

Managed Investments

Investment Bonds

Centrelink/Veterans Affairs Assistance

Aged Care

Budgeting and Cashflow Management

Debt Management

Remuneration

I am remunerated by:

- By an hourly rate.

Benefits, Interest and Associations

The business and I do not have any related parties, shareholdings or referral arrangements that may influence my advice.