

YOUR JOHNSTON GROCKE FINANCIAL PLANNING ADVISER

This document should be read in conjunction with the Financial Services Guide provided by your Adviser. A copy is available from your adviser on request.

Your questions

Our answers

Who is my adviser?



Anthony Klatt Dip FP, CFP, Grad Dip Man

Authorised Representative

Securitor Financial Group Ltd

What experience does my adviser have?

Anthony is a Principle of Johnston Grocke and has been in the Financial Services Industry for over 20 years, first in general banking and then managing the administration of a large industry superannuation fund and banking/credit union facilities offered through a not-for-profit organisation.

Over the last ten years Anthony has been in the financial planning industry providing quality strategic and investment advice, as well as portfolio management advice to a wide variety of working and retired clients. He and his clients work closely together planning for the accumulation and preservation of their wealth.

In addition, Anthony holds an appointed position as a Trustee of a National Superannuation Scheme with around 6,000 members.

Anthony provides proactive, responsive client service on an ongoing basis to bring comfort and peace of mind to his clients. He is assisted by a team of dedicated staff.

What are my adviser's qualifications?

Anthony is a Certified Financial Planner (CFP) and a member of the Financial Planning Association. He also has completed a Graduate Diploma in Management.

What product is my adviser authorised to sell or provide advice?

Securitor approved product list.

