

# Introducing your Bridges financial planner



## **Carl Lao**

CFP®, B.Bus, FCPA (FPS)

Authorised Representative's Number,  
issued by the Australian Securities and  
Investments Commission: 263967

## **Working with you**

Seeking professional advice to help achieve your financial goals is an important investment in your future. We are committed to working with you to define your goals and design a financial plan to meet your needs.

To arrange a complimentary, no obligation consultation with Carl, call  
**02 9633 9044**

**Carl Lao** has been working in the financial services industry for over 30 years. He has 15 years experience in a number of 'blue chip' companies in corporate accounting and has been a financial planner with Bridges since 1987.

He has received the designation of CERTIFIED FINANCIAL PLANNER™ from the Financial Planning Association and Financial Planning Specialist (FPS), CPA Australia.

As an Authorised Representative of Bridges, Carl has the technical expertise to advise clients with managing:

- Investment/wealth creation strategies
- Superannuation strategies and advice (including self-managed super funds)
- Investment structures
- Stockbroking
- Social security entitlements
- Portfolio management and review
- Estate planning

Backed by a team of leading research analysts clients have access to a range of leading Australian and international fund managers as well as listed investments.

Carl is committed to building long-term relationships with clients by providing them with the best in professional advice and personal ongoing service.

Carl Lao is an Authorised Representative of Bridges Financial Services Pty Limited (Bridges) ASX Participant AFSL No 240837

Part of Australian Wealth Management

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**Bridges**  
financial advice makes a difference