

## Adviser Profile

To be read in conjunction with the Unison Advice Services Ltd Financial Services Guide

### James Hakim CPA, BCom

Authorised Representative of The Trustee for CJM Wealth Trust

Corporate Authorised Representative Number 1273940

Level 1, 176 Burgundy Street, Heidelberg VIC 3084

Tel (03) 9455 0219

james@cjma.com.au

This Adviser Profile forms the second part of the Unison Advice Services Ltd Financial Services Guide (FSG). James Hakim is an Authorised Representative of Unison Advice Services Ltd with ABN 12 096 919 603, and Australian Financial Services Licence Number 228894.

## Qualifications

- Certified Practising Accountant – CPA Australia
- Bachelor of Commerce
- SMSF Core Course

## Product and services

James is authorised by Unison Advice Services Ltd to provide financial planning and class of financial product advice in the following areas:

Superannuation	Self Managed Superannuation Funds	Limited Resources Borrowing Arrangements
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Further to the above authorisations, James can refer clients on to an appropriate professional for the following services:

Mortgage Broking	Consumer Credit	Finance Broking
Deposit Products	Government Debentures, Stocks & Bonds	Managed Investment Schemes
Investor Directed Portfolio Services	Retirement Savings Accounts	Securities
Margin Lending (standard)	Investment Life Insurance Products	Life Risk Insurance Products
Business Insurance	Managed Discretionary Accounts (MDAs)	Direct Equities
Legal & Estate Planning	Property Management Services	Direct Property Services