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Adviser profile

Ben has been working in the financial service industry for over 10 years. During this time, he has developed a solid base of professional clients in Adelaide, Melbourne and Hobart.

He specilises in providing quality strategic and investment advice as well as portfolio management to a wide variety of working and retired clients .

Ben and his clients work closely to plan for accumulations and preservation of wealth and the provision of secure, tax efficient retirement income streams.

With a high percentage of clients with a professional background, including medical professionals, Ben is committed to providing a quality service based on regular communication.

A recent father, Ben knows first hand how important it is to ensure that a family secures its wealth for future generations.

Prescott Securities

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Important information

This Profile should be provided in conjunction and read with the Financial Services Guide, which sets out all other required matter.

As a representative of Prescott Securities, this adviser is authorised in accordance with the policies and procedures of the licensee to provide the specific financial services outlined below:

Financial services

Authorised to provide the following financial services to retail and wholesale clients:

- Provide Financial Product advice
- Deal in a Financial Product – by applying for, acquiring, varying or disposing of a financial product on behalf of another person in respect of the following classes of products:

Financial products

- Deposit and payment products, including;
  - basic deposit products;
  - deposit products other than basic deposit products; and
  - non-cash payment products;
- Debentures, stocks or bonds issued or proposed to be issued by a government;
- Life products including:
  - investment life insurance products; and
  - life risk insurance products;
- Interests in managed investment schemes including investor directed portfolio services;
- Retirement savings accounts products (within the meaning of the Retirement Savings Account Act 1997);
- Securities;
- Standard margin lending facility;
- Superannuation.