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Adviser profile

In introducing myself as an experienced, hands on personal financial adviser, I am aware of the importance of communication skills and personal integrity.

During my 13 years as an army officer I also learnt that if a subject was kept simple then there was a greater chance of it being understood and accepted by others, and I have applied these skills to achieve success for my clients over the past 27 years.

I specialise in helping retired people, and those "baby boomers" preparing for retirement during the last "ten golden years" of professional working life. My clients are usually in their late 40s through to their 60s and beyond, have accumulated or are in the process of accumulating significant wealth and aim to enjoy a comfortable and relaxed retirement with a minimum of fuss.

In addition to my South Australian based clients, I also look after clients in Tasmania. Assisting migrants from the UK has also been a specialisation over the last few years. I have been married to my wife Mavis for over 40 years and enjoy travel, camping, tennis and blue-water sailing.

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;
- 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.