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Adviser profile

With over 13 years experience in the financial services industry, Mike works with his clients to develop a long term financial strategy that is personal to their needs, and provides them with the financial security and stability they desire.

He strives to help people create and protect their wealth, so they can achieve their personal and financial goals throughout all stages of their lives.

Mike provides comprehensive advice covering an array of services including :

- superannuation
- tax effective wealth creation
- wealth protection strategies
- planning for your retirement and maximising income
- optimising social security benefits.

With a degree in Economics from the University of Liverpool (UK) and Certified Financial Planner status, Mike is well qualified to advise his diverse client base on their current and future requirements.



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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;
- Life products including:
 - investment life insurance products;
- Interests in managed investment schemes including investor directed portfolio services;
- Securities;
- Standard margin lending facility;
- Superannuation.

