



**Simon Croxton** CFP®, Dip FP, Grad Dip Mgt (Adel)

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### **Adviser profile**

Simon is the Principal of Prescott Securities Personal Risk Insurance Division. His background was in Banking and Finance prior to joining the Insurance Industry.

He has a Diploma in Financial Planning and is a Certified Financial Planner, the internationally recognised symbol of excellence in Financial Planning.

Simon is CCH Australia's author on Personal Risk Insurance issues, a regular presenter to the CPA Australia and lectures for the Securities Institute on Personal Insurance.

Simon specialises in providing quality personal risk insurance advice to executive, corporate and tertiary educated clientele. He works closely with his clients in the arrangement and ongoing review of their insurance portfolios.

He acts for his clients in all insurance considerations and does not represent nor have allegiances with any insurance companies. This differs to the traditional approach whereby the agent acts in the interests of the company(s) they represent.

Most importantly, when a claim occurs, he and his team are there to assist clients through the entire process, ensuring peace of mind when it is needed the most.



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ASX Market Participant | Australian Financial Services Licence No. 228894

### **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**

- Life products including:
  - investment life insurance products; and
  - life risk insurance products.

