



Toula Petrou AFP

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Adviser profile

Toula specialises in providing a fee based service to retirees and high net worth individuals. She works closely with her clients for the accumulation and preservation of their wealth with the aim of maximising their annual spending.

“My primary objective is to give personal advice, build good rapport with my clients and help them achieve their personal and financial goals. I maximise the amount my clients have available to enjoy their desired lifestyle without running down their assets and paying too much tax. This requires earning a good return on their investments without taking inordinate risks.”

Toula has been in the financial industry since 1986. She joined Pembroke Financial Planners in 1988 (later changed to Ord Minnett Ltd and Prescott Securities Ltd). The three companies have all operated from the same premises at Eastwood since 1991 with the same personnel.



Prescott Securities Limited | ABN 12 096 919 603

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

- 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;
- 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.

