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Adviser profile

I am passionate about the wealth management industry, in particular the vital importance a financial adviser plays in the wealth creation process. I particularly enjoy working with those clients who are looking to maximise their lifestyle in retirement, as well as those wishing to create wealth in their earlier stages of life.

A clients need for financial advice comes as a direct result of their desire to fully utilise their assets and income. On this basis, I am a firm believer of the peace of mind that quality advice can bring.

Having previously managed my own boutique wealth management firm, I can comfortably attest to the quality of offering clients receive from Prescott Securities.

An advocate of the work/life balance approach, Matthew believes it is important for both him and his clients to make the most of life - something he considers critical when developing a clients plan.

With a Bachelor of Economics, and Advanced Diploma in Financial Planning and a Graduate Diploma of Applied Finance, Matthew is well qualified and experienced to provide expert advice in the wealth management arena.

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.