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Adviser profile

Peter has been providing superior service to his financial planning clients for more than 18 years. He works closely with clients to provide wealth preservation and accumulation strategies in a secure and tax efficient environment.

With a background in professional Chartered Accountancy practices including many years in top tier firms in Brisbane, Peter is better placed than most to understand the highly complex issues facing many of his personal and business clients. A Certified Financial Planner, Peter is a member of both the Financial Planning Association and the Institute of Chartered Accountants in Australia.

A Principal of Prescott Securities, Peter is regularly called upon to make media comment and provide public presentations on issues relevant to families and businesses.

Peter is passionate about providing a complete service, encompassing all elements of financial planning, including superannuation, investments (including direct shares), personal insurance and estate planning

It's the partnerships with his clients that Peter values the most.



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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.

