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Adviser profile

Samuel is a solutions focussed Adviser, someone who enjoys working through client issues and coming up with a 'big picture' solution to best suit their specific needs.

Much of this approach comes from his strong technical and academic background and near ten years of experience in the financial sector to provide clients with a personal approach.

Estate planning is Samuel's particular passion, and he provides specialist expertise in this area to clients of many Advisers within Prescott Securities.

With a Bachelor of Business (majoring in Commercial Law), a Graduate Diploma of Financial Planning and a Masters of Applied Finance, Samuel is well qualified to provide clients with progressive and current financial guidance in a language they can clearly understand.



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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

- Deposit and payment products, including;
 - basic deposit products;
 - deposit products other than basic deposit products; and
 - non-cash payment 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.

