

# HELPING YOU CREATE, MANAGE & PROTECT YOUR WEALTH



We all lead busy lives. Between work, family and social commitments it can be hard to see things from a broad perspective. Whatever stage you're at in life, whether you're saving for your first home, wanting to reduce your debt or provide for the lifestyle you want in retirement, we'll work with you to build a financial solution to help you achieve your goals. As your life changes, we'll be there to help you remain on track.

## ABOUT FIDUCIAN

At Fiducian Financial Services, our aim is to help you achieve your financial goals and lifestyle aspirations. We work with you to provide a plan that will create, manage and protect your wealth over the long term. All Fiducian financial advisers are fully qualified, licensed and authorised to act under the Fiducian Financial Services AFS license issued by the Australian Securities and Investments Commission (ASIC). The Fiducian difference lies in our financial advisers' ability to form lasting relationships with their clients based on integrity, trust and expertise.

## PROFESSIONAL & EXPERIENCED

James has been part of the Fiducian Canberra team for three years. As an Authorised Representative of Fiducian Financial Services, James is committed to providing personalised financial advice to allow his clients to reach their individual goals and objectives.

Prior to working with Fiducian, James worked for Commonwealth Superannuation Corporation (CSC or 'CommSuper') within both client facing and technical calculation capacities. This experience provides James with an intricate specialist knowledge across these schemes, whilst also providing an understanding around the processes in place to ensure things operate smoothly. James has completed his Master of Financial Planning further enhancing his technical proficiency.

## QUALITY FINANCIAL ADVICE

- Wealth creation
- Financial security
- Retirement planning
- Wealth coaching
- Aged care
- Estate planning
- Wealth protection



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