

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

Alison is a Senior CERTIFIED FINANCIAL PLANNER® professional, the Financial Advice Association Australia's (FAAA) highest professional designation. She has been a personal financial adviser for more than 20 years and adopts a holistic approach to planning that encompasses debt management, retirement and pre-retirement planning, superannuation including Self-Managed Super Funds and pensions, insurance, wealth accumulation strategies and tax strategies.

In addition to her CFP® designation, Alison holds the designations of Life Risk Specialist (LRS®) and Accredited Estate Planning Strategist (AEPS®) practitioner with the FAAA.

Alison has met the FASEA exam standards required by law.

QUALITY FINANCIAL ADVICE

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



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