

# ADVISER PROFILE



## Palladium Wealth Partners Pty Ltd

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### Simon Allanson

**Senior Financial Planner, Co-Founder and Director of Palladium Wealth Partners Pty Ltd**  
**Authorised Representative Number: 443182**

### Background – About you Adviser

As co-founder and director of Palladium Wealth Partners Pty Ltd, I have played an integral role in establishing a wholly adviser owned business that focuses on providing highly personalised advice for you.

I have been a Financial Planner since 2001 having worked for Tynan MacKenzie and Westpac prior to Palladium Wealth Partners and more broadly in the financial services industry across various roles in both Adelaide and London.

I am highly qualified in the fields of investment and financial planning and am well placed to provide quality comprehensive advice in the areas of pre and post retirement planning, superannuation, redundancy, wealth accumulation, personal insurance and aged care.

In addition, I enjoy developing meaningful long-term client relationships which in turn can enable me to provide advice to more than one generation of your family, i.e. intergenerational advice.

I am passionate about advice and genuinely care about you as a person given you are at the centre of all that we do which all in all, provides you with financial security and your peace of mind.

### Qualifications

CERTIFIED FINANCIAL PLANNER (CFP®)

Graduate Diploma in Financial Planning (GDipFP)

Graduate Diploma in Applied Finance and Investment (GDipAppFin)

Bachelor of Finance (BFin)

### Financial Advisers Standards and Ethics Authority (FASEA)

Exam: Passed the FASEA Financial Advisers Exam – 11 May 2021

### Certifications

Accredited Listed Product Adviser (ALPA) Program

Margin Lending and Geared Investments

Self-Managed Superannuation Funds

TASA and the TPB Code of Professional Conduct

### Memberships and Registrations

Financial Planning Association of Australia (FPA)

Tax Practitioners Board (TPB) – Tax (Financial) Adviser