

# Adviser Profile



**Andrew Smith**

Senior Financial Planner

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Andrew is an employee and a representative of F W Holst & Co. Pty Ltd (HOLST). HOLST is an Australian Financial Services Licensee (AFSL No. 247841) under the Corporations Act and a Participant of Australian Securities Exchange Ltd (ASX).

As a Senior Financial Planner and Investment Adviser, Andrew's role is to balance the financial and lifestyle needs of HOLST clients when formulating wealth management and investment strategies and advice.

Andrew has over seventeen years experience in the financial services industry including periods working within the fields of Chartered Accounting, Funds Management, General Insurance and Financial Planning. Prior to joining HOLST, Andrew spent three years working within the Financial Planning division of global accounting firm Deloitte Touche Tohmatsu.

Andrew's academic background includes a Bachelor of Business in Accountancy (RMIT), Graduate Diploma in Investment and Applied Finance from the Financial Services Institute of Australasia (FINSIA), Graduate Diploma in General Insurance from Deakin University and most recently a Diploma in Financial Planning through the Financial Planning Association of Australia and Deakin University.

Andrew holds the Certified Financial Planner ("CFP") designation from the Financial Planning Association of Australia, is a Fellow of the Australian & New Zealand Institute of Insurance and Finance (formerly Australian Insurance Institute), a Fellow of FINSIA and a Member of the Stockbrokers Association of Australia (SAA). Andrew has also lectured regularly for both FINSIA and the ASX in financial planning and investment.

Andrew is qualified to give advice in the following areas:

- Strategic investment planning and wealth management advice
- Superannuation and retirement planning (including SMSF) advice
- Unlisted trusts, managed investments and life insurance products
- Portfolio reviews and evaluation
- Equity finance (Margin Lending) facilities
- Securities listed on the Australian Securities Exchange Ltd
- Cash and Fixed Interest investments (listed and unlisted)
- Listed and unlisted property trusts
- Portfolio Management and administration services

Andrew is committed to providing both existing and new HOLST clients with a full range of investment advisory and financial planning services of superior quality, creativity and value.

Your adviser may receive remuneration from HOLST in the form of salary, performance related payments and/or a portion of brokerage or other payments received by HOLST.

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