

Adviser Profile



Simon Power

Investment Adviser

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Simon 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 ASX Group.

Simon has fifteen years experience in the financial services industry working within the fields of Foreign Exchange, Institutional Equities and, since joining HOLST in 2000, Private Client Advising. Prior to joining HOLST, Simon spent two years working in London with global investment banks Morgan Stanley and Goldman Sachs.

Simon's academic background includes a Bachelor of Arts majoring in Economics from Monash University and a Graduate Diploma in Applied Finance and Investment from the Financial Services Institute of Australia (FINSIA). Simon has also completed the Securities and Derivatives Industry Association (SDIA) Accreditation Program.

Simon is a Fellow of FINSIA and a Practitioner Member Stockbroking of SDIA.

Simon is the Training Officer at HOLST and is an authorised skills assessor for the SDIA Accreditation Program.

Simon is in charge of trading in international securities at HOLST.

Simon is qualified to give advice in the following areas:

- Strategic investment planning and wealth management advice.
- Portfolio reviews and evaluation.
- Securities listed on the Australian Stock Exchange.
- Securities listed on recognised overseas Stock Exchanges.
- Unlisted trusts, managed investments and managed investment schemes.
- Equity finance (Margin Lending) facilities.
- Cash and Fixed Interest investments (listed and unlisted).
- Listed and unlisted property trusts.
- Portfolio Management and Administration services.

Simon is committed to providing both existing and new HOLST clients with a full range of investment advisory 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.

HOLST

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