

Adviser Profile



Trevor Davidson

Investment Adviser

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Trevor 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 Market Participant of the Australian Stock Exchange Ltd.

As an Investment Adviser, his role is to understand the financial objectives, risk profile and investment timeframe of clients. With a detailed knowledge of the client's financial position and objectives, Trevor provides clients with comprehensive and timely investment portfolio reviews and recommendations.

Trevor has over 10 years experience in the financial services industry, including 6 years with Goldman Sachs JBWere dealing with private clients, and 3 years with Chartered Accounting firm Bruce Mulvaney & Co.

Trevor's academic background includes a Bachelor of Arts and a Bachelor of Commerce from Monash University. He also has received a Graduate Diploma in Applied Finance and Investment (FINSIA). Trevor is currently a Senior Associate of FINSIA and is PS146 compliant after completing the accreditation program with the Securities and Derivatives Industry Association (SDIA).

Additionally, Trevor has completed the Level 1 Derivatives course with SDIA.

Trevor is qualified to give advice in the following areas:

- Securities Listed on the Australian Stock Exchange
- Securities listed on exchanges overseas
- Cash and Fixed Interest investments (listed and unlisted)
- Listed and unlisted property trusts
- Equity finance (Margin Lending) facilities
- Portfolio Reviews and Evaluation
- Managed Products
- Securities paying fixed or floating rates of interest

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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