the gild group

thegildgroup.com

Adviser Profile.

Claire Williams

Director & Senior Financial Adviser

Bachelor of Business (International Business)
Bachelor of Arts (Asian Studies-Japanese)
Diploma of Financial Planning
Registered Tax (Financial) Adviser
Self-Managed Super Fund Specialist Adviser

Self Managed Super Fund Association

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Website www.thegildgroup.com/wealth

About Claire

As a director of The Gild Group, I'm focussed on developing the business by mentoring and challenging our team to provide the best outcomes for clients and the company. Seeing our team excited, supported and thriving gives me great personal satisfaction. Great staff produce great outcomes for clients.

As an adviser, I find it most rewarding to remove the anxiety so often associated with finances from our clients' lives. I work with clients across all aspects of their financial affairs to paint the picture they see for their future. I have found it a privilege to be part of so many clients' lives and to work with them on their path to financial freedom.

Trust is so important to the client/adviser relationship so setting clear expectations, educating and mentoring my clients, and knowing what's important to them is the basis of us successfully working together.

I work across all areas of financial planning, but investments and complex problems are where I thrive. Bringing together specialists across our team to produce a client outcome is what I do best.

Outside of work I like to spend time with my friends and family. Cooking is a passion of mine and travelling is my happy place. I love animals especially my old girl Coco, and if I see a dog at a hundred paces I will pat it, don't even try to stop me.

Wealth Managed.

Gild Wealth Pty Ltd
ABN: 52 090 647 984 AFSL: 222154
445 Warrigal Road, Moorabbin VIC 3189
P: 03 9520 2999 E: wealth@thegildgroup.com

I am authorised to provide advice on the following areas on behalf of Gild Wealth:

Financial Products

Life Products including:
- Investment life insurance products
- Life risk insurance products

Superannuation products, including:
- Public Offer Superannuation Funds
- Account Based Pensions
- Self-Management Super Funds (SMSF)
- Annuities

Managed investment products, including:
- IDPS
- Managed Trusts
- Master Trusts, Wrap Facilities
- Property Syndicates
- Tax Effective Investments
- Retirement savings accounts

Government Bonds, Stocks or Debentures Securities including:
- ASX listed shares, instalment warrants & fixed interest

Lending including:
- Margin lending

This Adviser Profile is part of the Gild Wealth Pty Ltd Financial Services Guide (FSG) and should be read in conjunction with this document. If you have any questions after reading the information provided, I am happy to discuss them with you.

5 May 2023 (V1)

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