

## Adviser Profile.



### David Page

Director & Senior Financial Adviser

MBA (Finance), Graduate Diploma of Financial Planning  
Graduate Certificate of Commence, CFP®  
Registered Tax (Financial) Adviser

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### About David

In my role as a Director, I am focussed on getting sustained growth that enables our people to prosper and have exciting career opportunities. If our people are happy and successful, they will deliver a great service to our clients.

As an Adviser I want my clients to feel comfortable about their financial future. It provides me with a lot of satisfaction when we are able to remove financial stress and ensure goals are achieved.

I have lots of experience and knowledge that I enjoy sharing with others. My style of communication is to mentor rather than lecture and I love being able to solve troubling financial puzzles.

In my non work hours, I value my time with family and keep fit with a variety of sports including running, golf, paddle boarding, the occasional mountain bike. I am a tragically optimistic Carlton supporter and am always looking forward to better times ahead.

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)