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Adviser Profile.

Rowena Thiele FCPA

Senior Financial Adviser & Registered Tax Agent

Bachelor of Business (Accountancy)
Graduate Diploma of Financial Planning
Registered Tax (Financial) Adviser

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Website www.thegildgroup.com/wealth

About Rowena

I work with clients assisting them with developing their evolving goals, needs and circumstances in this environment of significant change. This process results in implementing sound strategies for clients to grow wealth now and in retirement.

My role is It is to manage client expectations in turbulent times as well as the good times.
I spend time getting to know my clients and together we work towards getting the right asset allocations for their investments. I use a consistent framework for review meetings and encourage interactive client participation. We create a roadmap for the future and check in every meeting to see how the client is going.

Having established and run my own CPA Public Practice in accounting services, taxation advice and self-managed super funds, I have developed a strong technical skillset and mentoring attitude. This helps me advise clients in retirement planning incorporating tax and super strategies which can assist clients to maximise their retirement savings and superannuation.

The ability to see the whole picture for a client is extremely important and having a strong skillset across a number of disciplines enables clients to feel confident that all aspects of their financial affairs are being considered.

I love to spend time with family and friends enjoying bike rides on the rail trails throughout Victoria.
Our home is near the beach, and I walk and cycle regularly using the fantastic beach paths that go all the way to Port Melbourne.

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

Financial Products

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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

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.

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