



## Adviser Profile.



### Wendy Wallace

Senior Financial Adviser

Bachelor Honours (Accounting), AFP®  
Advanced Diploma of Financial Services (Financial Planning)  
Cert IV Finance & Broking  
Self-Managed Super Fund accreditation  
Registered Tax (Financial) Adviser

**Mobile** 0432 446 584

**Email** wendy.wallace@theildgroup.com

**Website** [www.theildgroup.com/wealth](http://www.theildgroup.com/wealth)

### About Wendy

I have been involved in the financial services industry for over 30 years and bring a wealth of experience to my role as a Senior Financial Adviser. I have held positions within a number of high-profile Fund Managers, including an Australian equity, fixed interest and a property fund manager; a superannuation and investment financial service provider and I have experience in private banking.

I have previously managed a Financial Planning division of a Chartered Accounting practice and most recently managed a Financial Planning practice.

Building strong client relationships is important to me, and I enjoy providing clients with personal tailored quality advice.

All Gild Wealth Advisers have undertaken mandatory training related to the provision of financial planning and can provide specialist advice on a range of financial matters. All Gild Wealth Advisers are required to continually update their knowledge and skills through ongoing training.

**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@theildgroup.com](mailto:wealth@theildgroup.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

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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