the gild group

Adviser Profile.

Stephen Cleary
Financial Adviser

Master of Financial Planning
Bachelor of Commerce
Registered Tax (Financial) Adviser

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About Stephen

I love getting to know my clients and working together to find their best outcome towards security and prosperity. It provides me great fulfillment to help ease financial anxiety and following through to ensure goals are achieved.

I've been involved in the financial services industry for over 13 years. Outside of work, I love spending quality time with my partner, kids and dogs. I also enjoy organising catchups with friends and hiking.

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.

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