



# FINANCIAL PROFESSIONALS

wealth creation = advice + management



## *Supplementary Financial Services Guide*

# Daniel Rickard

## **Financial Adviser, Investment Specialist**

**M.FP, AFP®, BBiomedSc**

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Daniel has accumulated a wealth of experience over his two and a half years with the team, evolving into a financial adviser who provides a complete range of holistic advice to clients.

Daniel manages our financial planning service via the coordinated delivery of advice and works with clients to successfully implement strategies once agreed. Daniel is also a key member of the Investment Committee and undertakes detailed research to support investment selection and portfolio management.

Daniel gained his master's degree in Financial Planning at Griffith University, where he obtained the highest grade in the cohort in over half of courses completed. As a firm believer in lifelong learning, he is currently working towards his CFP and CFA professional designations.

Daniel is dedicated to helping our client's achieve their primary goals and enjoys being a part of their journey along the way. Daniel also is passionate about bringing leading edge, bespoke investment management to a wider clientele than the top percentile.

Daniel is an employee of Financial Professionals and receives a salary and possible bonuses. He receives no commissions or rebates from any third party.

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