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WEALTH

Business Profile, Financial Services & Credit Guide

OCTOBER 2021

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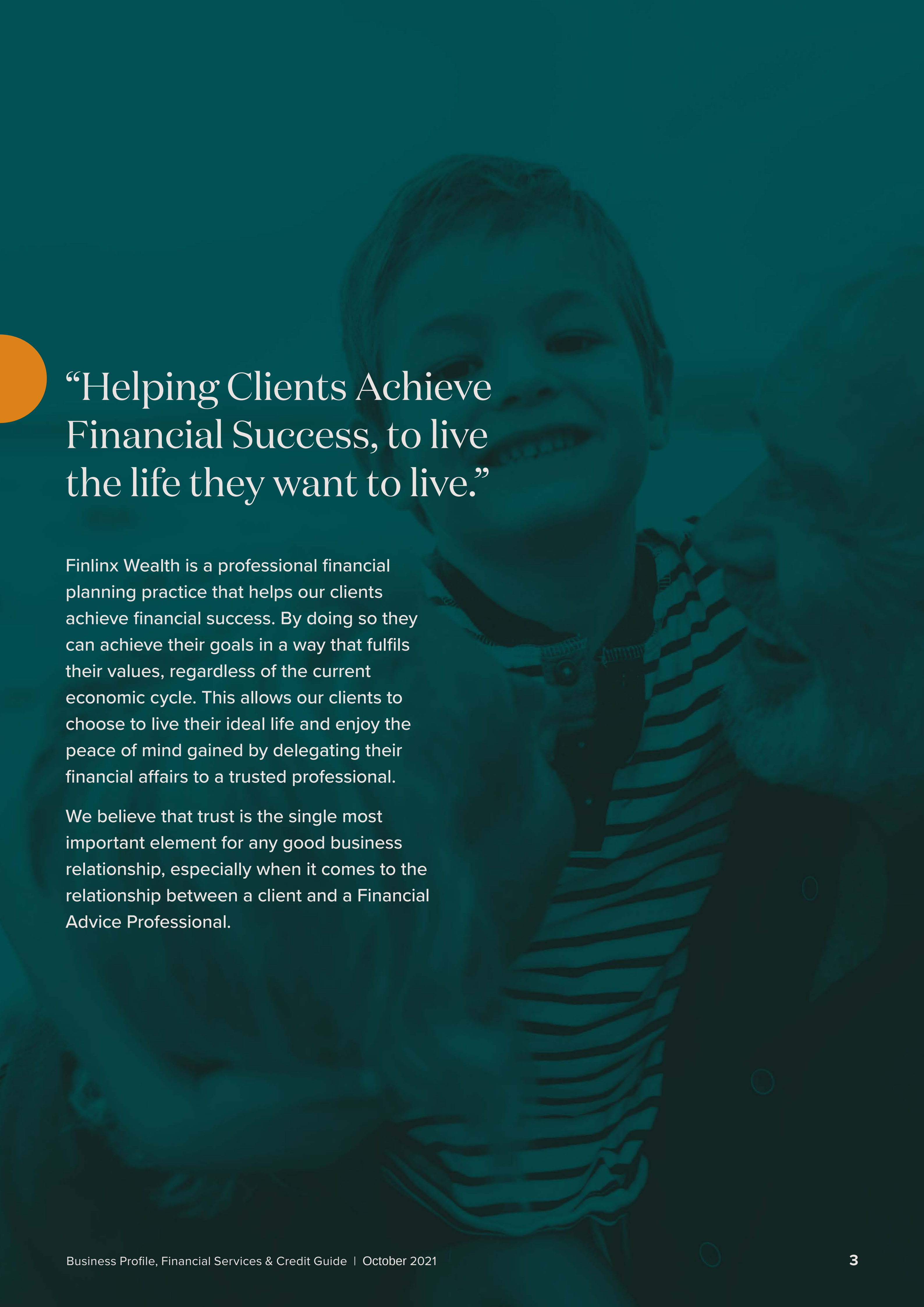
Contents

Lack of Independence Disclosure

Finlinx Wealth is not independent, impartial or unbiased because we receive commissions for the advice we provide on life risk insurance products.



“Helping Clients Achieve Financial Success, to live the life they want to live.”

Finlinx Wealth is a professional financial planning practice that helps our clients achieve financial success. By doing so they can achieve their goals in a way that fulfils their values, regardless of the current economic cycle. This allows our clients to choose to live their ideal life and enjoy the peace of mind gained by delegating their financial affairs to a trusted professional.

We believe that trust is the single most important element for any good business relationship, especially when it comes to the relationship between a client and a Financial Advice Professional.

Company profile

Finlinx Wealth has its origins dating back to 1978. Since then we've helped individuals achieve their financial goals by adopting the latest academic, market and legislative research.

'Our Goal is to help clients achieve financial success'

We are a privately owned Company with no links or ties to any financial institution. This freedom from product influence provides our clients with the greatest potential for financial success.

Finlinx Wealth subscribe to an evidence-based investment philosophy. We align ourselves with the most experienced and accomplished academics in the field. Our goal is to build portfolios which seek to harness the positive in markets whilst allowing us to weather the inevitable downturns.

Today, Finlinx Wealth oversees in excess of $275 million for our firm's clients. We are licensed to the privately owned FYG Planners Group which has over $3 billion in funds under advice.

Our services

Our clients are people with varying goals, incomes and lifestyles, but they all share one thing in common – they delegate to us so they can focus on what is really important to them.

Finlinx Wealth will help identify ways to maximise the benefits from your existing financial resources. Our qualified advisers have extensive experience in the following:

- Strategic Planning Advice
- Reliable Asset Class Investing
- Investment Advice
- Superannuation
- Risk Review and Risk Insurance
- Retirement Planning
- Centrelink & Social Security Benefits
- Estate Planning
- Taxation Matters
- Advice on Ownership Structures
- Redundancy
- Business Continuation Insurance

Our people

MATTHEW STEVENS

B Com DFP CFP®

Authorised Representative No. 226321
Credit Representative No. 403244

Matthew is a CERTIFIED FINANCIAL PLANNER with 20+ years' experience in the financial planning with extensive knowledge and experience within the industry assisting a diverse range of clients.

Matthew has completed a Bachelor of Commerce (Accounting) through James Cook University as well as a Diploma of Financial Planning through Deakin University.

In May 2003 Matthew attained the designation of Certified Financial Planner.

What's your background?

I studied Accounting at University, enjoyed 7-8 years of banking but it's been Financial Planning ever since. I've always been a planner, forever looking forward and strategising how to make things better and achieve goals. Doing this for clients is just an extension of who I am.

What do you enjoy most about your role?

Simply, I love what I do and get real enjoyment what we help clients achieve. I still remember my father 25 years ago asking me, why Financial Planning? My reply wasn't money or grandeur, it was simply "I like helping people". Perhaps a little cheesy but true.

What do you love most about being part of Finlinx Wealth? We are a group of friends that mould together to help each other. We don't have anyone over our shoulder telling us what to do or forcing us to sacrifice our values, as such we are able to concentrate on what matters for the client. We are big enough that we can exchange ideas, provide broad services and have good work/life balance.

Qualifications

Bachelor of Commerce from James Cook University majoring Accounting.
Diploma of Financial Planning from Deakin University
Certified Financial Planner of the Financial Planning Association

BRAD GORDON

DFP Dip Acc Dip Bus AFP®

Authorised Representative No. 290813
Credit Representative No. 431259

A Mackay area local, Brad joined the Finlinx Wealth team in 2017. Brad has a good understanding across the agriculture and business sectors within the region and has experience in strategic planning, investments, superannuation & retirement planning.

He has a wide range of experience across the diverse areas of financial planning and the management and operation background provides Brad with a great understanding of clients needs.

What's your background?

I entered the finance industry in 2004 after 10 years working in agriculture while studying at CQU University. After gaining experience in the industry with one of Australia's largest financial services providers I operated my own AFSL for five years before merging with the Finlinx Wealth team and becoming a Partner.

I was fortunate in my previous roles including that of Responsible Manager for an AFSL to gain experience across the diverse areas of financial planning and operations management of licensee's which has provided a great platform for assisting clients achieve their financial and life goals.

What do you enjoy most about your role?

Naturally I'm a numbers guy, I enjoy that I in a role and position that allows me to utilise my skills to improve the lives of our clients. It's very rewarding to assist clients and guide them through the journey of building wealth to see them achieve their goals. It is a great feeling that you have been able to help clients reach the point they can live the life they want to live.

What do you love most about being part of Finlinx Wealth?

The team– the team that we have at Finlinx is great, everyone is supportive for one another and focused on our clients first. It makes the workday feel less like work when the people around you are all on the same page.

Qualifications

Diploma of Financial Planning
Diploma of Accounting
Diploma of Business
Authorised Financial Planner (FPA)

Our people

NICK CUNNINGHAM

B Bus(Mgt) DFP MIML AFP®

Authorised Representative No. 1240805
Credit Representative No. 486111

Nick is an AFP® FINANCIAL PLANNER and has been with Finlinx Wealth since 2007. Over the years Nick has gained extensive experience in Strategic and Wealth Planning, Superannuation and Retirement Planning as well as Risk Insurance strategy. Nick grew up in Mackay and has completed a Bachelor of Business as well as Diploma's in Financial Planning and Management.

Nick is focused on developing strong relationships with his clients to ensure all advice and strategies are in line with their key goals and objectives.

What's your background?

I grew up in Mackay and studied at Central Queensland University. As a child I loved sports, playing music and having fun.

What do you enjoy most about your role?

The fact that every day is different. I feel incredibly privileged to be able to spend my days talking with individuals and couples about the things that are most important to them. Having the opportunity to work with people and incorporate a road map to success is incredibly rewarding.

What do you love most about being part of Finlinx Wealth?

We strive to encourage an open and inclusive environment. At Finlinx Wealth we focus heavily on the concept of being a team where everyone's role is important. I feel this allows us to work together in our client's best interest.

Qualifications

Bachelor of Business (Management
Diploma of Financial Planning
Authorised Financial Planner (FPA)
Associate Fellow to the Institute of Managers and Leaders
Commissioner of Declarations (QLD)

KAREN MASON

AdvDip FP AFP®

Authorised Representative No. 434719
Credit Representative No. 434720

Karen is an AFP® FINANCIAL PLANNER who has worked in the Financial Services Industry since 1981. During this time, she has gained extensive experience in all aspects of financial planning. Karen has an Advanced Diploma in Financial Planning which she completed in 2009 and is also a member of the Financial Planning Association. Karen is a Mackay local and grew up in the Pioneer Valley.

What's your background?

I commenced working in the financial services industry with the National Bank of Australasia in 1981 and have worked for several other financial institutions since then. I eventually moved into the financial planning industry in 2004 at which time I commenced my studies.

What do you enjoy most about your role?

I enjoy getting to know my clients and assisting them to achieve their goals.

What do you love most about being part of Finlinx Wealth?

The Finlinx team are great to work with and have a vast knowledge of financial planning and work well together to ensure our clients have a successful financial experience.

Qualifications

Advanced Diploma in Financial Planning
Certificate III in Finance
Commissioner of Declarations
Member of the Financial Planning Association

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