

Adviser Profile – Serena Palmer

Serena Palmer is an Authorised Representative (ASIC NO. 422609) of Peninsula Wealth & Financial Services Pty Ltd AFSL No. 537043. Serena transitioned into the financial services profession in 2012 after a prior career in hotel management. Originally from south west of WA, Serena has called the east coast home for the past 20 years. She moved to the Mornington Peninsula with her husband Simon and enjoys spending time with their golden retriever, eating Simon's food and playing golf.

Why I enjoy financial planning?

- Helping people understand the options available to them to help them get where they want to go!
- Provide financial guidance through different life stages
- Building valued & long term relationships
- Supporting clients to achieve their financial and lifestyle dreams / ambitions
- Is nearing completion of her Graduate Diploma in Financial Planning

Advice I specialise in:

- Superannuation
- Pre-Retirement & Retirement planning
- Investment planning
- Personal and business protection
- Centrelink
- Debt management and gearing
- Cashflow and budgeting management

Qualifications

- Advanced Diploma of Financial Services (Financial Planning)
- Diploma of Financial Services (Financial Planning)
- Margin Lending

Memberships and Associations

- Financial Advice Association of Australia

Experience

- Qualified as a Financial Planner in June 2012 after transitioning from the AMP Horizons program in 2011
- Founded SPR Financial Solutions in 2012 before merging into Peninsula Wealth Management Pty Ltd 2023
- Co-Founder of Peninsula Wealth & Financial Services Pty Ltd and Peninsula Wealth Management Pty Ltd