Adviser Profile – Simon Raines

Simon Raines is an Authorised Representative (ASIC NO. 431863) of Peninsula Wealth & Financial Services Pty Ltd AFSL No. 537043. Simon brings comprehensive technical experience to the Peninsula Wealth & Financial Services Pty Ltd license and to Peninsula Wealth Management with more than 30 years dedicated to the financial services profession. Melbourne born and bred, his professional career has seen him live interstate. He made the sea change to the Mornington Peninsula with his wife Serena in 2016 and in his spare time enjoys cooking and playing golf.

Why I enjoy financial planning?

- Providing quality and ethical solutions to help clients through different life stages
- Provide clients with education to assist with making informed decisions to help them achieve their financial and lifestyle goals.
- Wide and in-depth experience of helping clients through various life stages

Advice I specialise in:

- Self-Managed Super Fund establishment and Investment strategy (High Net Wealth)
- Pre-Retirement & Retirement planning
- Business planning for small, medium & large business enterprises
- Aged Care strategies
- Inter-Generational wealth transfer
- Investment planning
- Debt management and gearing
- Cashflow and budgeting management

Qualifications

- Masters in Financial Planning
- Certified Financial Planner ™
- Diploma of Financial Services (Financial Planning)
- SMSF and Margin Lending
- Certificate in Superannuation Management

Memberships and Associations

- Financial Advice Association of Australia

Experience

- Senior management and corporate advisory roles in the financial planning sector
- Former FPA Chapter Chair for Wollongong, NSW
- Co-Founder of Peninsula Wealth & Financial Services Pty Ltd and Peninsula Wealth Management Pty Ltd