

Adviser Profile – James Holt

James Holt is an Authorised Representative (ASIC NO. 1002565) of Peninsula Wealth & Financial Services Pty Ltd AFSL No. 537043. James has been a Financial Planner for over 17 years, starting his career in the UK before moving to Australia 13 years ago. He has been living on the Mornington Peninsula for the last 9 years with his wife Jo. He enjoys playing tennis and golf and sits on the committees of several business groups in the area.

Why I enjoy financial planning?

This role enables me to really get to know my clients, developing a strong relationship with them, and working together to achieve great outcomes.

I love helping clients to have a deep understanding of their financial situation, through discussion and education and I take great satisfaction in seeing the progress we can make together over time.

Advice I specialise in:

- Retirement planning
- Small Business advice
- Superannuation
- Investment planning
- Debt management and gearing
- Wealth and personal protection
- Cashflow and budgeting
- Group Insurance
- Company Insurance

Qualifications

- BA Marketing
- Diploma of Financial Services (Financial Planning)
- Advanced Diploma of Financial Services (Financial Planning)

Memberships and Associations

- Certified Financial Planner®
- Financial Advice Association of Australia

Experience

- Commenced working in the Financial Services industry in the UK in 2002.
- Qualified as a Financial Planner in the UK in 2005, and subsequently in Australia in 2009.
- Became a Director of Bayside Financial Planners in 2018
- Co-Founder of Peninsula Wealth & Financial Services Pty Ltd and Peninsula Wealth Management Pty Ltd