

Adviser Profile – Jason Spears

Jason Spears is an Authorised Representative (ASIC NO. 259600) of Peninsula Wealth & Financial Services Pty Ltd AFSL No. 537043. Jason has been a Financial Planner since 2000, starting his career with NAB and moving to Bayside Financial Planners in 2003. Jason has been living on the Mornington Peninsula for most of his life. He is married to Jane who works in the office and he has two children. He enjoys playing golf, mountain bike riding and bush walking in his spare time.

Why I enjoy financial planning?

- Establishing and building long term relationships
- Educating clients in regard to their financial options to assist with achieving their lifestyle goals.

Advice I specialise in:

- Retirement planning
- Small Business advice
- Superannuation including Self-Managed Superannuation Funds
- Investment planning
- Debt management and gearing including Margin Lending
- Wealth and personal protection
- Company Insurance
- Lending including Limited Recourse Borrowings

Qualifications

- Graduate Diploma of Financial Planning
- Certified Financial Planner®
- Diploma of Financial Services (Financial Planning)
- Diploma of Financial Planning
- Certificate iv in Mortgage Broking

Memberships and Associations

- Financial Advice Association of Australia
- Finance Brokers Association of Australia

Experience

- Commenced working for NAB in 1985.
- Commenced working as a Financial Planner with NAB in 2000.
- Became a Director of Bayside Financial Planners in 2003
- Co-Founder of Peninsula Wealth & Financial Services Pty Ltd and Peninsula Wealth Management Pty Ltd