BERESFORDS

Wealth Management

ADVISER PROFILE

Harry Bronn

“Harry explains very well how our portfolios are managed. He is on top of all aspects of our personal and business situation. We feel safe with him going into retirement and love having clarity on meeting our retirement goals.”

Harry Bronn, Senior Financial Adviser
Beresfords Wealth Management Pty Ltd

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02 9993 3912
Level 7/75 Pitt Street
Sydney NSW 2000

www.beresfords.com.au

This Adviser Profile is part of the Beresfords Wealth Management Pty Ltd Financial Services Guide (FSG) and must be read in conjunction with the main document.

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Am I authorised to provide financial services and products?

Yes. I am an Authorised Representative of Beresfords Wealth Management Pty Ltd, AR#246077 and a Registered Financial Adviser #1005118, and Tax (Financial) Adviser #251 63248.

What areas am I authorised to advise on?

I am authorised by Beresfords Wealth Management Pty Ltd to advise, and to deal, on their behalf on the following financial services and products:

- Managed Investments
- Superannuation
- Retirement Income Streams
- Deposit Taking Facilities
- Margin Lending
- Life and Disability Income Insurance
- Portfolio Administration Services
- Retirement Savings Accounts
- Securities
- Structured Products
- Government Debentures, Stocks and Bonds.

In addition to the services listed on page 4 of the FSG, are there any services I am not authorised by Beresfords Wealth Management Pty Ltd to provide?

No, I am authorised to provide a full and comprehensive service.

What are your educational qualifications and experience?

- Master of Commerce (Financial Planning)
- Master of Business Administration (MBA)

I have over 25 years' experience in financial markets, and financial planning since 2009.

How am I paid?

I receive an annual salary as an employee of Beresfords Wealth Management Pty Ltd. I am entitled to receive additional remuneration for achieving Key Performance Indicators – these typically relate to meeting agreed client service standards, client satisfaction, workflow, professional development and quality of advice. I am also eligible to participate in a profit sharing arrangement.

About me:

I started my career in the South African army, and as an Officer, focused on Banking & Finance, before moving on to work for Standard Chartered Bank in their Treasury Dealing Room.

I have held a number of Treasury, Foreign Exchange, and Hedging roles for global financial institutions, which has taken me all over the world, ultimately settling in Australia and heading up Corporate Treasury at St George bank.

Since 2009, I have loved adapting my skills to match the more personal and advisory field of financial planning - a career I am delighted to pursue with Beresfords Wealth Management.

My current role allows me to fulfill my passion to understand and help people, building close-knit, long-lasting relationships. I thrive on the challenge of creating the best possible outcomes for my clients, and helping them to fulfill their life dreams.

When I'm not planning your future wealth, you'll find me exploring my other passion - the beautiful Australian outback.