

Financial Adviser

Simon Guiliano CFP®

Senior Financial Adviser

Simon joined Segue Financial Services as a Senior Financial Adviser in April 2006, with a brief of assisting existing and new clients to achieve their financial goals.

Prior to this, Simon spent three years as a Para-Planner/Financial Adviser at a suburban financial planning practice and before that, 6 years as an equities analyst with InvestorWeb, a provider of investment research on Australian shares and Managed Funds to retail and wholesale clients.



Qualifications

- Certified Financial Planner
- Advanced Diploma of Financial Planning
- Graduate Diploma of Applied Finance & Investment
- Bachelor of Business (Sport Management)

Personal

Simon is married with two children. He enjoys spending time with his family, catching up with friends and is an avid sports fan, with a keen interest in cricket, AFL football and golf.

Career

Simon gains great personal satisfaction from assisting clients to achieve what's important to them through the implementation of quality advice and the clear and precise communication of complicated topics.

He is experienced in the development of strategic comprehensive advice to clients in the areas of superannuation, budgeting, income/cash flow planning, taxation planning, government entitlements and investment management.

Simon enjoys the challenges of the ever changing financial services industry, and prides himself on keeping up to date on legislative changes which bring opportunities for our clients to achieve what is important to them. He develops a close relationship with the clients he looks after.