

Adviser Profile



Tim Flavell

This profile is part of the Financial Services Guide (FSG) and should be read in conjunction with the FSG.



Meet your adviser

Your adviser is Tim Flavell, an Authorised Representative (AR No. 326407) of Vantage Wealth Management Pty Ltd as trustee for the Vantage Wealth Management Unit Trust (Vantage). Advice is provided by him through Vantage a Corporate Authorised Representative (AR No. 337994), of VWM Financial Services Pty Ltd (AFSL No. 345744).

Tim is an Executive Director of Vantage Wealth Management Pty Ltd and VWM Financial Services Pty Ltd. Tim holds a Bachelor of Business from Victoria University with majors in Economics and Banking and Finance. He has completed a Diploma in Financial Planning through Deakin University and the Financial Planning Association. This allowed him to qualify as a Certified Financial Planner®.

Tim commenced working in the financial services industry in 1990. He co-founded Vantage Wealth Management in 2008.

Tim specialises in assisting clients in the following areas:

- Superannuation and retirement income planning strategies
- SMSF investment strategy and portfolio design
- Tax effective portfolio construction
- Strategic investment planning using direct, income producing securities
- Medical practitioners, professional services partners, company directors, senior managers and business owners

Tim is married to Naomi and they have three children.

What financial services are we authorised to provide and what products do these services relate to?

Vantage is authorised to provide the following financial services:

Financial product advice and deal by applying for, acquiring, varying or disposing of a financial product on behalf of another person in:

- Basic deposit products;
- Non-basic deposit products;
- Government debentures, stocks or bonds;
- Investment life insurance products;
- Life risk insurance products;
- Interests in managed investment schemes including IDPS;
- Retirement savings accounts;
- Securities;
- Standard margin lending facilities; and
- Superannuation;

to retail and wholesale clients.

Tim Flavell is authorised to advise and deal in all the financial products listed above. He is not authorised to provide advice on direct real property and digital assets such as cryptocurrencies, NFTs and other tokens.

How will you be paid for the services provided to me?

Tim Flavell is an Authorised Representative and an Executive Director of Vantage Wealth Management Pty Ltd. As such, he is entitled to receive a salary. Additionally, dividend distributions may be payable to entities associated with him. His remuneration is not linked nor related to specific investment recommendations but is related to the profitability of Vantage.

Do any relationships or associations exist which might influence you in providing me with the financial services, other than outlined within the Financial Services Guide?

No.