SYDNEY FINANCIAL PLANNING
est. 1988
advice that stands the test of time

T 02 9328 0876
M 0403 261 292
E gary@sydneyfinancialplanning.com.au
A Suite 13, Edgecliff Mews
201 New South Head Road
Edgecliff NSW 2027
W www.sydneyfinancialplanning.com.au

Gary Winwood-Smith

Senior Financial Planner | Director

"I am passionate about working with my clients to identify, clarify and quantify their dreams. Together, with focus and determination, we can achieve amazing results."

SPECIALIST SKILLS

Financial & lifestyle planning
Wealth creation strategies
Debt & cash-flow management strategies
Risk insurance strategies
Self-Managed Super Funds (SMSF) advice
Retirement Planning advice

PROFESSIONAL QUALIFICATIONS

Bachelor of Commerce (Financial Planning and Investment)
Self-Managed Superannuation Funds (SMSF) Program
Direct Equities Program
Certificate IV Finance & Mortgage Broking
Tax (Financial) Adviser
Margin Lending Program

MEMBERSHIPS AND ASSOCIATIONS

Authorised Representative of Charter Financial Planning
Member of the Financial Planning Association (FPA)
Member of the Association of Financial Advisers (AFA)
Member of the Credit Ombudsman Service

CAREER AND INDUSTRY HIGHLIGHTS

2015 Most Trusted Advisers Network - Beddoes Institute
2016 Most Trusted Advisers Network - Beddoes Institute
2017 Most Trusted Advisers Network - Beddoes Institute
2018 Most Trusted Advisers Network - Beddoes Institute
Adviser Ratings – Platinum Adviser
Adviser Ratings – Top 50 Adviser
FPA Professional Practice

PERSONAL INTERESTS

Outside of work, Gary is the father of young twins and a primary schooler. Gary also enjoys touch football, swimming and is a keen NBA fan.