Prime

Marcus Ainger CFP®

Partner – Private Client Adviser

T 02 9134 6292 | **M** 0428 434 518
E marcusa@primefinancial.com.au

Qualifications & Designations

- Certified Financial Planner ®
- Bachelor of Business (Banking & Finance)
- Graduate Diploma of Financial Planning
- Financial Essentials Course in Self Managed Superannuation Funds

Expertise

Marcus is authorised to deal in the following financial products:

- ✓ Basic and non-basic deposit products
- ✓ Derivatives
- ✓ Government debentures, stocks or bonds
- ✓ Life products
- ✓ Interests in managed investment schemes, including IDPS
- ✓ Retirement savings accounts
- ✓ Superannuation
- ✓ Securities
- ✓ Standard Margin Lending

About Marcus

Marcus is a Senior Adviser with significant experience in the banking and wealth industry, previously working at St George Bank and Bank of Melbourne. During this time, he was awarded "Advisor of the Year" in 2009 and 2014.

Marcus works primarily with high net worth individuals and business owners, advising on wealth management, asset protection, superannuation and investments. He has an outstanding knowledge of superannuation as well as associated tax and estate planning issues.

Marcus brings a dynamic and exuberant approach to all client matters. He has a strong commitment to ongoing knowledge and continually strives for the best possible results for clients in an ever changing market.

Marcus is a salaried employee and is eligible to receive up to 20% of his base level remuneration in both short-term and long-term bonus incentives. This is on the basis that Marcus meets the objectives set by Primestock Securities which include client services standards, training and compliance, in addition to any financial targets.

Advisory Services

Our financial services are personalised to our clients' needs. We can provide a total financial solution, or alternatively advice can be limited to a particular service or situation, including:

- ✓ Financial & Retirement Planning
- ✓ Wealth Creation, Accumulation & Consolidation
- ✓ Retirement Planning Strategies
- ✓ Investment Advice
- ✓ Life Insurance
- ✓ Superannuation Advice including Self Managed Superannuation Fund (SMSF)
- ✓ Wills & Estate Planning
- ✓ Business Succession Planning
- ✓ Asset Protection
- ✓ Lending & Finance

Prime Financial Group

A Level 17, HWT Tower
40 City Road, Southbank VIC 3006
P 1800 064 959
E clientservices@primefinancial.com.au
Prime Financial Group

aspire, innovate, grow & impact