Dylan Cresswell CFP®

Partner - Private Client Adviser

T 03 8825 4707 | **M** 0428 434 801
E dylanc@primefinancial.com.au

Qualifications & Designations

- Certified Financial Planner®
- Bachelor of Business (Accounting)
- Advanced Diploma of Financial Services
- Kaplan Professional Education Course in Self Managed Superannuation Funds

Expertise

Dylan 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

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

About Dylan

Starting his career in Financial Services in 2005, Dylan has built up an extensive knowledge of Self Managed Superannuation Funds, investment and personal protection strategies.

Dylan has advised High Net Worth clients of Boutique advisory businesses, Commonwealth Financial Planning and more recently he spent five years with Grant Thornton Australia.

Dylan's experience and extensive qualifications ensure he is well placed to work with clients of varying needs, helping them to achieve their financial goals.

Dylan 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 Dylan 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

aspire, innovate, grow & impact