



Adviser Profile

“My expertise is helping clients with strategies to grow their wealth while giving consideration to asset protection.”

Michael Dempsey

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Morgans

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Services and specialities

Margin Lending and
Gearing Strategies

Options and Warrants

Personal Insurance

Retirement and Estate
Planning

Self Managed Super Funds

Stockbroking

Michael is a Director and part owner of the entity that manages the Gosford office. Michael can advise on areas such as Self Managed Super Funds, stock selection, asset allocation, life insurance, margin lending, warrants and term deposits. He can also personalise your very own wealth creation strategy that will suit your investment goals and risk appetite.

Investment Style

Whether you are a conservative investor that only wants fixed interest, a balanced investor building a balanced portfolio or an aggressive investor chasing growth, Michael can adapt his advice to suit you.

Industry Education and Experience

Qualifications

- Diploma of Financial Services (Financial Planning), Mentor Education, Sydney, 2008
- RG146, PS146, Sydney, 2008

Professional associations

- Member of Stockbrokers and Financial Advisers Association (MeSAFAA)
- Tax (Financial) Adviser

ASIC approved competencies

- Derivatives Level 1
- Financial Planning
- Life Insurance
- Margin Lending
- Superannuation
- Derivatives Level 2
- Generic
- Managed Investments
- Securities

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Never
underestimate
the **power**
of a well-made
decision