



# Adviser Profile

“I work with investors to develop a customised investment portfolio, supported by the correct wealth creation and protection strategies that empower investors by offering more control, flexibility and transparency.”

## Simon Royle

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### Morgans

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1/6 Burns Crescent  
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Simon is a Senior Adviser, Branch Manager and a Director of the management company operating the Gosford office of Morgans. Simon has been providing advice to retail investors since 2001, joining Morgans as a Private Client Adviser in 2003.

## Investment Style

Simon takes a comprehensive financial planning approach to assist clients in creating wealth. He does this with a view to advise on investment structures including consideration of superannuation (in particular self managed superannuation), estate planning and personal insurance requirements. Simon takes a proactive approach to clients portfolios with the use of direct equities, warrants, income strategies and tax effective strategies.

## Industry Education and Experience

### Qualifications

- ASX Broker Exam, Securities Institute, Sydney, 2004
- Advanced Diploma of Financial Services (Financial Planning), Kaplan, Sydney, 2005
- SMSF Specialist Advisor™ (SSA) Accreditation, SMSF Association, Sydney, 2013

### Professional associations

- AFP Member of the Financial Planning Association (FPA)
- Member of Stockbrokers and Financial Advisers Association (MeSAFAA)

### ASIC approved competencies

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

## Services and specialities

Personal Insurance

Portfolio Administration

Retirement and Estate Planning

Self Managed Super Funds

Stockbroking

Wealth Management

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