



“Over the last 35 years I have assisted my clients to work towards and realise their dreams. I feel I have the experience to help them through the next stage of their life. I still feel as passionate about helping my clients as I did 35 years ago, but now have more wisdom and the grey hair to match!”

William Bracey

Principal | Senior Financial Planner

UNIQUE QUALITIES

William's vast experience provides him with the skills to understand and articulate clients' financial and lifestyle challenges with great clarity. He has the unique ability to explain often technical concepts in client-friendly language.

PROFESSIONAL QUALIFICATIONS

Advanced Diploma in Financial Services (Financial Planning) ADFP
Self-Managed Superannuation Funds (SMSF) Program
Margin Lending & Geared Investments Program
Direct Shares Program

SPECIALIST SKILLS

Wealth creation strategies
Transition to retirement strategies
Risk management strategies
DIY and Self-Managed Super Funds (SMSF Advice)
Small Business and Business Aged Care
Succession planning
Tax (Financial) Planner

MEMBERSHIPS AND ASSOCIATIONS

Authorised Representative of Charter Financial Planning
Member of the Association of Financial Advisers
Member of the Credit Ombudsman Service
Justice of the Peace (NSW)
Member of Financial Advisers Association of Australia (FAAA)
Fellow Chartered Financial Practitioner (AFA) FChFP
Member of The Advisers Association (TAA)
Tax (Financial) Adviser

CAREER AND INDUSTRY HIGHLIGHTS

William established W. Bracey Sydney Financial Services in 1988 and has overseen its steady development into an industry leader. The business now looks after the financial affairs of thousands of families with combined assets in excess of \$500 million dollars. He has been listed in the 2013, 2014, 2015, 2018 and 2023 in Most Trusted Advisers Network. He has also had substantial commercial experience having previously been owner, board member and managing operator of several regional retail stores. In 2019, Bill was the winner of the Gerald Lippman Award, in recognition of quality advice and service to the community. In 2022, Bill has received prestigious Astrum Lifetime Achievement Award.

PERSONAL INTERESTS

William enjoys spending time with his three children and dog. He loves surfing and boating activities and is an avid Wallabies and Roosters supporter.