



James Middleton

Financial Planner

“Building wealth doesn’t need to be complicated. We take the guesswork out, and help you lay the groundwork for your future.”

SPECIALIST SKILLS

- Aged care advice
- Wealth creation strategies
- Investment options and management
- Tax Planning and Tax minimization
- Superannuation and Pension Advice
- Retirement Planning
- Insurance and risk mitigation

PROFESSIONAL QUALIFICATIONS

- Master of Commerce (Finance)
- ASIC Registered Financial Advisor
- Certified FAAA Aged Care Specialist

MEMBERSHIPS AND ASSOCIATIONS

- Australian Financial Complaints Authority
- Financial Advice Association Australia
- The Advisers Association
- Justice of the Peace (NSW)

CAREER AND INDUSTRY HIGHLIGHTS

James discovered his passion for the industry through firsthand experience with quality financial advice. Motivated by the impact he could have on others’ financial well-being, he transitioned from a successful career in psychology research to pursue a Master of Commerce, specializing in investment management. His commitment to excellence was evident as he graduated “With Excellence.”

PERSONAL INTERESTS

- Tabletop wargaming
- Scuba Diving
- Spending quality time with my new baby boy & partner