Richmond Private Wealth

**WHY WE EXIST**

Our clients find that they do not have the time, skills or inclination required to make sense of the complex superannuation and investment rules and regulations. We exist to guide, assist, advise and manage our clients through this maze and to hold them accountable to their long term financial goals and aspirations.

**ABOUT OUR CLIENTS**

Our clients include self-funded retirees, business owners, farmers and executives in various industries. Although their fields of expertise are wide and varied all have the following similar traits:

1. **Take Advice** - Willing to take advice from experts
2. **Have Financial Complexities** – they can’t resolve on their own
3. **Are Respectful** - to work with
4. **Recognise we can add value** – and hold them accountable over their financial lives
5. **Recognise we are affordable** – in providing financial advice solutions tailored to their needs

**ABOUT US**

Richmond Wealth Pty Ltd (Richmond Wealth) is different from many financial advisory practices as it holds its own Australian Financial Services Licence (461605) which has been issued by the Australian Securities and Investments Commission (ASIC).   
  
Richmond Wealth is 100% privately owned and as such has no links to banks, fund managers or any other financial institution.  Richmond Wealth has no “financial products” to offer / sell.  In fact we despise this term.   We offer bespoke financial services, tailored to the needs of each client.  Simple as that.   
  
Clients of Richmond Wealth (many of which have been serviced by us for decades), pay a fee for service based on the complexity and the level of ongoing work required.  We are transparent, diligent and client focussed in everything we do.

**OUR WEALTH ADVISERS**

## Scott Stanley

Scott Stanley is the Managing Director of Richmond Wealth Pty Ltd.  
  
He has been providing financial planning and investment advice to clients since 1993. Prior to forming Richmond Wealth, he has been director and part owner of Alliance Investment & Retirement Services Pty Ltd since 1998.  
  
He holds a Bachelor of Business in Accounting & Finance, a graduate diploma in Financial Planning (SIA) and is a SPAA SMSF Specialist Advisor™.  He is a member of the Financial Planning Association (FPA), a Fellow of FINSIA and is a member of the Association of Financial Advisers (AFA).  
  
Outside of work, Scott enjoys keeping fit via cycling, running, mountain biking and running around after his three boys.  He also gives back to the community where possible and is a Trustee of a prominent charity www.wacharitydirect.com.au

## 

## Paul Gardiner

Paul Gardiner has been providing financial planning and investment advice to clients since 1999.   
  
He has five years specific financial planning and investment advice experience and an additional 10 years in banking and general insurance.  
  
He holds an Advanced Diploma in Financial Planning, a Diploma in Finance/Mortgage Broking and is currently working towards completing a Bachelor of Commerce at Curtin University.  
  
Outside of work, Paul enjoys hanging out with his daughter Maggie and keeping fit by running (including the odd half marathon here or there).

## John Dimitroff

John Dimitroff chairs the investment committee of Richmond Wealth Pty Ltd.  
  
He has many decades of experience in the financial services industry.  He was Director Private Banking at St George Bank from 2009 to 2010 and was State Manager Broker Mortgage Services at St George Bank from 2005 to 2006.  He also held a variety of senior positions within the Commonwealth Bank of Australia where he served as an employee for over 30 years.  
  
He has extensive management and leadership skills and he holds a Diploma of Financial Planning from the University of Technology, Sydney.  
  
Outside of work, John loves his Golf and is a member of Royal Perth Golf Club.  He is also an avid reader of financial news and anything relating to personal investing.

## SERVICE AREAS

## Richmond Wealth provides ongoing tailored financial services designed to meet each client’s specific needs. We are licenced to provide a comprehensive range of services including:

## Superannuation advice

## Self-Managed Superannuation (SMSF) advice

## General Securities / Investment advice

## Managed Discretionary Account (MDA) services

## Ongoing portfolio management

## Retirement planning advice

## Aged Care & Centrelink advice

**OUR PROCESS**At Richmond Wealth, we follow the Financial Planning Association of Australia’s (FPA) six step process to financial planning which involves:  
  
1.    Defining the scope of engagement  
2.    Identifying your goals  
3.    Assessing your financial situation  
4.    Preparing your financial plan  
5.    Implementing the recommendations  
6.    Reviewing the plan

**BENEFITS OF PERSONAL FINANCIAL ADVICE**

Our clients trust us implicitly to always act with honestly, diligence and in their best interests at all times. Some of this is encapsulated in the following testimonials.

***Holding clients accountable to future goals and aspirations***  
“We are very busy professionals in the field of Information Technology Services and Consulting.  When an opportunity presented itself to sell our business we needed a firm to advise and manage our finances and to hold us accountable to all of our future financial goals and aspirations.  Scott Stanley and the Team at Richmond Wealth provide just that.  We can verify that the Team at Richmond Wealth provide a personalised and individually tailored financial service rather than one which is for the masses.  In addition, Scott and his Team are always available to take our call when something comes up or if we just want to run an idea or investment opportunity by him.”

*A DUTTON & T MORRISON*

***Choosing to outsource our financial planning requirements was their best decision***

"When our plans for retirement became serious we realised that we knew nothing about investment and needed advice. We attended a course run by Ken Barrett and were impressed with his knowledge and approach. When Ken and Brad Martyn started Alliance we chose them to arrange our investment portfolio and our superannuation fund, and we have been with them ever since. Ken has since retired and Scott Stanley of Richmond Wealth has managed out financial affairs ever since but the integrity and dedication has not changed. Richmond Wealth provide a professional, personal and worry-free service, with independent and targeted advice. Choosing to outsource our financial planning requirements is the best financial decision we have ever made."

*G PRINCE & K STOTT.*

***Personalised service through several of life’s phases***

"We have been associated with Scott Stanley for well over a decade and can verify that they he and his team are diligent, honest and have integrity in everything they do. We have received very good personalised service through wealth accumulation, superannuation planning and administration and now pension phases of our financial life. We have never once felt like just a number but rather a valued member of a family and have complete faith in Richmond Wealth to manage, protect and develop our investments."

*ROSS & SUE WILLIAMS.*

## OFFICE DETAILS

***Office:*** 70B Kishorn Road,   
Mount Pleasant WA 6153

***Mail:*** PO Box 1061,   
Canning Bridge, WA 6153

***Phone:*** 08 6323 3131  
***Mobile:*** 040 380 8400

***Email:*** admin@richmondwealth.com.au  
***Web:*** www.richmondwealth.com.au