



Anthony Smith

CFP®, B.Bus, JP

Authorised Representative Number 319962

Anthony has 20 years' experience in financial services and whilst analysis and research are at the heart of Anthony's technical skills, it is having a deep understanding of his client's goals and objectives which he is passionate about.

Anthony is a Certified Financial Planner™ practitioner, has a Bachelor of Business degree (Applied Finance). He has completed the Self-Managed Superannuation Fund Specialist Advisor Program and the Stockbrokers Association Professional Diploma in Stockbroking. Anthony is a member of the Financial Planning Association of Australia.

When away from work, Anthony enjoys spending time with family and friends. He assists and supports a number of charity groups and competes in various fundraising events. He also invests time on his health and wellbeing, competing in long distance triathlon races, mountain biking with his children and running.

Anthony is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending.

Related Parties

Anthony maintains an interest in HK Wealth Advisory Pty Ltd (ACN 626 486 968) which is jointly owned by Private Wealth Partners Advisory Pty Ltd & HK Partners Advisory Pty Ltd. If Anthony receives a referral from HK Wealth Advisory Pty Ltd, we will pay a percentage of any upfront fee he receives from you (ranging up to 50%) to HK Wealth Advisory Pty Ltd and will then evenly share any ongoing advice fees received from you with HK Wealth Advisory Pty Ltd after any operating costs are met. For example, if you paid an upfront advice fee of \$1,000, Anthony will pay up to \$500 to HK Wealth Advisory Pty Ltd. If you pay an ongoing advice fee, Anthony may pay up to \$500 per annum to HK Wealth Advisory Pty Ltd. If we make a payment as a result of a referral, we will notify you of this within your advice document or by an alternative means provided in writing.





Cameron Taylor

MFP, GradDipFinPlan, BBA BA-Psych, JP

Authorised Representative Number 471209

Cameron entered the advice industry as a client relationship manager in a boutique financial planning practice in 2006. This initial exposure gave him an appreciation of the many components required to provide comprehensive, holistic and professional financial advice. Cameron has an experiential appreciation of truly understanding clients and their objectives which is enhanced through his studies in Psychology. Being a Financial Adviser allows Cameron to channel his skills and qualifications into helping people now and into the future where the true satisfaction of providing good advice becomes evident.

Cameron has a Masters & Graduate Diploma in Financial Planning, Bachelor of Business Administration with a Bachelor of Arts – Psychology, Diploma of Financial Planning, Diploma of Business and Commerce, is a Justice of the Peace and a member of the Financial Planning Association of Australia. He has also completed specialist qualifications in Self-Managed Superannuation Funds, Gearing and Margin Lending. Outside of work Cameron plays a variety of sports including golf, tennis and triathlon. He spends time fundraising and supporting charities, is a keen traveller and enjoys watching cricket and rugby.

Cameron is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending. Your PWPG adviser receives 100% of all fees/commissions and pays Private Wealth Partners Group an expense recovery.

Referral Fees

Where we refer you to other product or service providers and you decide to purchase products or services from them, we may receive a payment as a result of our referral. If we receive a payment as a result of our referral, we will notify you of this within your advice document or by an alternative means provided in writing.

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Damien Skidmore

B.Bus(Fin). DFP, JP

Authorised Representative Number 247043

Damien has a diverse and sophisticated background in financial markets. In 1990 he started work with Westpac Foreign Exchange monitoring foreign currency breaches in 'minor' currencies. In 1995 Damien took up a role as a futures trader and broker with the U.S merchant bank J.P Morgan. Damien was a registered representative of the Sydney Futures Exchange and a New York Mercantile Exchange trader (NYMEX Access).

This experience led to Damien starting his own trading business in 1998 as a 'local' trader on the Sydney Futures Exchange, trading mainly medium dated bond derivatives, currencies and equities. Damien commenced advising retail clients in 2002 as part of the Australian Unity Financial Planning license and was named the Australian Unity Financial Planner of the year in 2008, 2009 and 2010.

Damien has a Bachelor of Business (Finance), a diploma of Financial Planning (FPA), numerous trading and advising qualifications and is a member of the Financial Planning Association of Australia. Damien and Renaye have three young girls, Tara, Zoe and Emily.

Damien is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending. Your PWPG adviser receives 100% of all fees/commissions and pays Private Wealth Partners Group a monthly expense recovery.

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Emma Hutchinson

M.IntBus. DFP

Authorised Representative Number 1272945

Emma joined Private Wealth Partners in 2019 after 3 years at a smaller boutique planning firm. She has over 15 years' experience working within the financial services industry, mainly in Investment Management and Fund Administration.

Originally from Guernsey in the Channel Islands, Emma came to Sydney in 2014 to be closer to family.

Emma holds a Master's in International Business and a Diploma in Financial Planning.

Emma is authorised to provide advice on Investment life insurance products, Life risk insurance products, MDA services, Managed investments schemes and all aspects of Superannuation. Emma is a salaried employee.

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Ian Smith

B.Comm, MEc, MAppFin
CA – Financial Planning Specialist
CFP – Certified Financial Planner

Authorised Representative Number 247709

Ian has over 25 years of successful business experience in finance, stockbroking, funds management and banking. He has worked in capacities of Finance Director, Strategy Director and Head of Private Stockbroking for one of the World's largest investment banks, Deutsche Bank.

Ian has experience in offering the full professional financial advisory services. This includes:

- Developing strategies to provide tax efficient income and capital growth for wealth creation, wealth retention, redundancy and retirement planning clients
- Creating comprehensive strategic financial plans and investment structures for individuals, family trusts, private companies and self managed superannuation funds
- Maximising tax saving opportunities and searching for low cost solutions
- Maximising superannuation opportunities within complex government guidelines, including advising on and establishing self managed superannuation funds
- Recommending appropriate investments to achieve clients' objectives
- Recommending risk management strategies and gearing opportunities
- Partnering with tax and legal experts to manage complex estate planning such as asset protection, minimising estate tax and wealth transfer issues
- Facilitating premium stockbroking services

Ian is a Chartered Accountant – Financial Planning Specialist and a Certified Financial Planner. He has attained the higher education degrees of Master of Applied Finance, Master of Economics, Bachelor of Commerce.

Ian is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Gearing, Life Risk Insurance Products, Managed Investments Schemes, Securities, Superannuation.

Ian is a salaried employee of Private Wealth Partners Advisory Pty Ltd. He may be eligible to receive a discretionary bonus if he meets the objectives set by his employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if he is to be eligible for a discretionary bonus.





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Matthew Oake

BSc, GradDipAppFin, DipFinPlan, JP

Authorised Representative Number 426956

Matthew joined Private Wealth Partners in October 2016, prior to this he was a Financial Adviser at DWL Financial Services for over 15 years. Matthew has also held various positions in a major Australian Stock Broking firm followed by an advisory role in another boutique financial planning practice. Prior to working in financial services Matthew was a Geologist for some of the world's largest gold and base metal mining companies.

Matthew provides advice to a diverse range of clients which requires him to be technically competent across all financial planning strategies. With a passion for investing and an ability to ascertain each client's individual needs, Matthew has the necessary skills to ensure his clients have every opportunity to achieve their financial goals.

He holds a Bachelor of Science, a Graduate Diploma of Applied Finance and Investment, Diploma of Financial Planning and has completed specialist studies with regard to Self-Managed Superannuation Funds. Matthew is also a member of the Financial Planning Association of Australia.

Outside of work Matthew is all about sport, either participating personally or watching his three sons from the sidelines.

Matthew is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending. Your PWPG adviser receives 100% of all fees/commissions and pays Private Wealth Partners Group a monthly expense recovery.

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Natalie Berrell

BCom, DIPFinPlan, DIP Fin & Mortgage Broking, JP

Authorised Representative Number 1268606

Natalie joined Private Wealth Partners in 2017 after working at Macquarie Bank for a number of years. She has over 10 years' experience working in the banking industry, bringing a diverse background of knowledge to financial services. Drawing on her experience across different relationship management roles, she understands the importance of solidifying trust, respect and approaching each client's situation in a non-judgemental way. Natalie is passionate about improving her clients' financial literacy and believes this is key to achieving lasting financial stability.

Natalie has a Bachelor of Commerce, majoring in Finance and a minor in Commercial Law. She has a Diploma of Financial Planning, Cert IV in Finance & Mortgage Broking, is a member of the Financial Planning Association of Australia, the Tax Practitioners Board and is a Justice of the Peace.

Outside of work you will see Natalie walking her beautiful red and white border collie, running to work, playing netball and competing in anything that has endurance in the name. She has a passion for health and wellbeing.

Natalie is authorised to provide advice on Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance products, MDA services, Managed investments schemes, Securities and Superannuation.

Natalie is a salaried employee of Private Wealth Partners Advisory Pty Ltd. She may be eligible to receive a discretionary bonus if Natalie meets the objectives set by her employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if she is to be paid such amounts.

HK Wealth Advisory Pty Ltd (ACN 626 486 968) is jointly owned by Private Wealth Partners Advisory Pty Ltd & HK Partners Advisory Pty Ltd. If Natalie receives a referral from HK Wealth Advisory Pty Ltd, we will pay a percentage of any upfront fee received from you (ranging up to 50%) to HK Wealth Advisory Pty Ltd and will then evenly share any ongoing advice fees received from you with HK Wealth Advisory Pty Ltd after any operating costs are met. For example, if you paid an upfront advice fee of \$1,000, a payment up to \$500 will be made to HK Wealth Advisory Pty Ltd. If you pay an ongoing advice fee, a payment up to \$500 per annum will be made to HK Wealth Advisory Pty Ltd. If we make a payment as a result of a referral, we will notify you of this within your advice document or by an alternative means provided in writing.





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Ray Albrighton

BCom, DFP, CFP, JP

Authorised Representative Number 441069

Ray has comprehensive experience in the financial services industry. For over 20 years Ray has worked in multiple positions as diverse as advising complex private clients, SME advisory and business coaching and leading a national retail advice team.

Ray's passion is engaging with private clients and business owners to provide extensive holistic and complex financial solutions. Ray continues to thrive on delivering bespoke outcomes for his clients and utilising his professional network to deliver remarkable results.

Ray is a member of the Financial Planners Association (FPA) and Association of Financial Advisers (AFA).

Ray is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, Gearing, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending.

Ray is a director and shareholder of Private Wealth Partners Advisory Pty Ltd. Ray, as your PWPG adviser, receives 100% of all fees/commissions and pays Private Wealth Partners Group a monthly expense recovery.

Related Parties

Ray maintains an interest in Infocus Wealth Management Ltd ABN 28 103 551 015 and its wholly-owned subsidiaries (Infocus Property Advisory Pty Ltd ABN 33 140 154 570, Infocus Lending Advisory Pty Ltd ABN 19 134 237 031, Infocus Tax & Business Advisory Pty Ltd ABN 40 615 064 983, Infocus Financial Planning Pty Ltd ABN 78 129 238 099, Alpha Fund Managers Pty Ltd ABN 37 124 085 883, Alpha Investment Management Pty Ltd ABN 13 122 381 908, & Platformplus Pty Ltd ABN 46 103 551 533). In acting in your best interests, Ray may be required to make recommendations with regards to investments or products held with Infocus Wealth Management Ltd ABN 28 103 551 015 and its wholly-owned subsidiaries. To ensure any potential conflict of interest risk is mitigated, Ray will offer an alternative PWP adviser to be appointed to provide you advice. If you would prefer that Ray continues to provide you with advice, Ray will proceed to provide advice to you in accordance with the best interests duty in the Corporations Act 2001 (Cth) that applies to all financial advisers. Ray does not receive any remuneration for recommending any related party products with Infocus Wealth Management (and its subsidiaries). Ray is an individual member of the Association of Financial Advisers Limited (AFA), Certified Financial Planner® and the Tax Practitioners Board (TPB). As a member of these organisations, Ray is required to adhere to the AFA, CFP and TPB's standards.





Ray maintains an interest in HK Wealth Advisory Pty Ltd (ACN 626 486 968) which is jointly owned by Private Wealth Partners Advisory Pty Ltd & HK Partners Advisory Pty Ltd. If Ray receives a referral from HK Wealth Advisory Pty Ltd, we will pay a percentage of any upfront fee he receives from you (ranging up to 50%) to HK Wealth Advisory Pty Ltd and will then evenly share any ongoing advice fees received from you with HK Wealth Advisory Pty Ltd after any operating costs are met. For example, if you paid an upfront advice fee of \$1,000, Ray will pay up to \$500 to HK Wealth Advisory Pty Ltd. If you pay an ongoing advice fee, Ray may pay up to \$500 per annum to HK Wealth Advisory Pty Ltd. If we make a payment as a result of a referral, we will notify you of this within your advice document or by an alternative means provided in writing.

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Thomas Lyon

B.Comm (Acc & Fin.Plan), GDip.Psych

Authorised Representative Number 1282369

Thomas started his journey into Financial Services from the ground floor. After being accepted into a graduate program he has worked his way through roles such as Client Service Manager, Paraplanner, Associate Adviser, before becoming a Financial Adviser. Progressing clients to a position where their assets can support part of, or the entirety of their lifestyle is a core driver for Thomas. When clients are in a position that they are confident their advisor is making the best decisions for them, they have the time to enjoy the things they value most in life, family, travel or their own personal ambitions.

Having completed a bachelor's degree in commerce, majoring in both Financial Planning and Accounting, Thomas has also completed a post-graduate in Psychology. Combining his background in Finance and Psychology he aims to truly connect on a personal level with each and every one of his client's and help them understand the way they think about their money.

If he is not in the office, you'll find him Surfing at Manly, in the CrossFit gym or at any other outdoor activity that gets the heart beating. Thomas has visited 26 countries around the world (with Argentina being the favourite) and surfed in 7 of them.

Thomas is a salaried employee of Private Wealth Partners Advisory Pty Ltd. He may be eligible to receive a discretionary bonus if Thomas meets the objectives set by his employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if he is to be paid such amounts.

HK Wealth Advisory Pty Ltd (ACN 626 486 968) is jointly owned by Private Wealth Partners Advisory Pty Ltd & HK Partners Advisory Pty Ltd. If Tom receives a referral from HK Wealth Advisory Pty Ltd, we will pay a percentage of any upfront fee received from you (ranging up to 50%) to HK Wealth Advisory Pty Ltd and will then evenly share any ongoing advice fees received from you with HK Wealth Advisory Pty Ltd after any operating costs are met. For example, if you paid an upfront advice fee of \$1,000, a payment up to \$500 will be made to HK Wealth Advisory Pty Ltd. If you pay an ongoing advice fee, a payment up to \$500 per annum will be made to HK Wealth Advisory Pty Ltd. If we make a payment as a result of a referral, we will notify you of this within your advice document or by an alternative means provided in writing.





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Regan Isaac

GradDipFinPlan, Dip FS (FP) AChFP

Authorised Representative Number 343326

Regan has more than 15+ years of experience across various sectors in the financial services industry incorporating retail banking, institutional and investment banking, funds management and financial planning.

Regan's passion lies in having a deep and authentic relationship with each one of his clients. He specialises in providing strategic and holistic advice to professionals and complex family offices.

Regan is an Associate Chartered Financial Practitioner™ and has completed postgraduate studies in financial planning encompassing advanced financial strategies, taxation and law. He is also undertaking additional qualifications in business.

Regan is both a practitioner member of the Association of Financial Advisors (AFA) and an Affiliate member for the Society of Trust & Estate Practitioners (STEP)

When he's not in the office, Regan enjoys travelling and spending time with family and friends. He also loves the outdoors and enjoys hiking in remote areas of NSW and competitive team sports.

Regan is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending.

Regan is a shareholder of Private Wealth Partners Financial Advisory Pty Ltd. Regan as your PWPG adviser receives up to 100% of all fees/commissions and pays Private Wealth Partners Group a monthly expense recovery.

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Jasmine Theophile

CFP, B.Com, Grad.Dip FP, FPA Aged Care Specialist, JP

Authorised Representative Number 319963

Jasmine joined the Private Wealth Partners team in 2023 and joined the financial services industry in 2004. Jasmine has qualified as a Certified Financial Planner™ practitioner since 2010 and holds a Bachelor of Commerce degree, Graduate Diploma in Financial Planning and additional specialised qualifications in Self-Managed Superannuation Funds, Derivatives, Securities and Aged Care.

Jasmine is a member of the Financial Planning Association of Australia (FPA) and is also accredited as an Aged Care Specialist (ACS) by the FPA.

Attention to detail and a holistic approach to financial planning are at the heart of Jasmine's personalised and tailored approach to each client that she advises.

On the weekends, Jasmine is often by the soccer sidelines cheering on her two sons, or volunteering in her local Lugarno community. She also enjoys organising fun social events with her family and friends, as well as playing and composing music.

Jasmine is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending.

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David Hunt

Bbus (CSU), Master of Taxation Law (Syd), Institute of Chartered Accountants, SPAA, Registered Tax Agent (25508503)

Authorised Representative Number 245990

David has extensive experience advising providing senior executives, private business owners and their families as Chartered Accountant and Financial Planner. David is advisor and confidante to some of the most senior executives in Australia.

David's early interest in investments lead to commencing his career at Industrial Equity Limited (IEL) followed by Chase Manhattan Securities in London where he completed the London Stock Registered Representative exam.

David combined his love of investing and providing strategic solutions to private clients when he established his own firms, Hunt Strategic Advisors Pty Ltd and Hunt Strategic Capital Pty Ltd after being a partner in his family accounting and financial planning business from the year 2000.

David is a Chartered Accountant, a Self-Managed Superannuation Fund Specialist Advisor and holds a Bachelor of Business (Accounting) and a Master of Taxation Law from Sydney University.

David's significant experience and expertise are in the following areas:

- Family business advising
- Superannuation and retirement planning
- Estate planning
- Investments
- Investment structuring

David is married with three children. His interests include all sport, particularly rugby, rugby league, golf and tennis.

Related Parties

HK Wealth Advisory Pty Ltd (ACN 626 486 968) is jointly owned by Private Wealth Partners Advisory Pty Ltd & HK Partners Advisory Pty Ltd. If David (in his capacity as a qualified Accountant) refers a new client to Private Wealth Partners Group Pty Ltd, there is a commercial arrangement in place between HK Wealth Advisory & Hunt Strategic Advisors whereby David may receive a payment under this arrangement. To ensure any potential conflict of interest risk is mitigated, David will offer an alternative PWP adviser to be appointed to provide you advice. If you would prefer that David continues to provide you with advice despite the referral arrangement, David will always provide advice in accordance with the best interests duty. David is required to adhere to high levels of professional standards at all times. If we make a payment as a result of a referral, we will notify you of this within your advice document or by an alternative means provided in writing including the amount of the payment.





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