

# Jim Fenwicke

## Wealth Adviser



### Jim Fenwicke

CFP®, LRS®, AEPS®, BEc,  
GDipAppFin, Adv.Dip.FS(FP),  
Dip.FS(FP)

Jim is a financial markets professional with over 30 years' experience in roles including strategic financial planning, trading, back office operations, compliance and management. He has worked for some of Australia's leading financial institutions including Macquarie Bank and National Australia Bank.

Jim is a Certified Financial Planner professional member of the Financial Planning Association of Australia and an accredited Life Risk Specialist and Estate Planning Strategist. He holds a BEc from Sydney University; a Graduate Diploma of Applied Finance and Investment; and an Advanced Diploma of Financial Planning.

Jim is passionate about helping people to achieve their lifestyle goals and life ambitions. Modern living distracts people from what is really important to them and robs them of the time needed to make increasingly complex financial decisions. Jim works with clients to build the financial resources they need to achieve better balance in their lives.

Jim is married with 3 children and away from work enjoys rugby, golf and yoga.

### You can contact Jim at:

<b>Phone</b>	02 8078 2444
<b>Address</b>	Level 6, 100 Walker Street, North Sydney NSW 2060
<b>Postal address</b>	PO Box 6491, North Sydney NSW 2059
<b>Email</b>	<a href="mailto:jim@fenwickefinancial.com.au">jim@fenwickefinancial.com.au</a>
<b>Website</b>	<a href="http://www.fenwickefinancial.com.au">www.fenwickefinancial.com.au</a>

---

### Fenwicke Financial

Fenwicke Financial is wholly owned by its founder and principal Jim Fenwicke. Jim is the member of the Boutique Financial Planning Principals Association which gives us access to the knowledge and experience of other financial planning professionals, which assists us with strategy formulation, portfolio construction & management.

Fenwicke Financial Services Pty Ltd ATF Anerom Unit Trust trading as Fenwicke Financial ABN 83 360 801 306 AFSL 515738