



## Adviser Profile

### Neil McPherson

MFin, CFP®, SMSF Specialist Advisor™ TEP™

#### Senior Financial Consultant

Representative of Tynan Mackenzie Pty Ltd

Neil is a Certified Financial Planner, with over 20 years experience in financial services, including retirement planning, estate planning, investment & insurance solutions. He has also attained the highly regarded SMSF Specialist Advisor accreditation and is a registered Trust and Estate Practitioner.

Neil has proven experience in advising and managing the complexity associated with the financial affairs of professionals, business owners and senior executives, especially in relation to structuring investment portfolios for tax efficiency and the particular opportunities and requirements of SMSF. He has also advised on the appropriate use of investment structures for the support and protection of vulnerable beneficiaries (e.g. children with special needs) and charitable giving.

With a career including senior roles with Colonial Investment Management, Potter Warburg, BZW, two Chartered Accounting firms and a stock-broking firm, Neil has accumulated a wealth of knowledge and experience to advise you on all manner of financial planning requirements. He ensures that the big picture (financial structure) and small picture (investments) work optimally together.

Neil particularly enjoys working closely with clients and finds that this assists him in developing tailored strategic solutions that achieve optimal financial opportunities, while seeking to minimise the potential disruption to the family's financial objectives that can arise during key lifecycle changes of divorce, redundancy, transitioning to retirement, and the personal and business impact arising from death or disablement of family members.

Neil is involved in his community as a nationally accredited Basketball Coach and Scoretable Official. He is also a past member of his children's school board.

### Contact Details

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