ABOUT YOUR ADVISER

Tom Gray

Wealth Adviser
Authorised Representative No. 1299046

Tom started with Adrians as a Paraplanner and after completing his Master of Financial Planning and professional year has commenced as a Financial Adviser. Tom is dedicated to helping our clients reach their financial goals. With personalised guidance and support, he builds strong relationships and creates comprehensive financial plans. Tom monitors progress, provides education, and offers ongoing support to ensure clients stay on track.

Education, Qualifications & Memberships

- Bachelor of Commerce, Finance (University of Queensland)
- Master of Financial Planning (Griffith University)
- Member of the Financial Advice Association of Australia (FAAA)

What kinds of advice is Tom authorised to provide?

Tom is authorised to provide financial product advice and deal in a financial product, to retail and wholesale clients, in relation to the following financial products:

- Basic deposit and payment products
- Debentures, stocks or bonds issued or proposed to be issued by a government
- Life products, including investment life insurance products and life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services – these are managed funds, master trusts and “wrap” accounts
- Retirement savings accounts (“RSA”) products
- Securities – meaning shares listed on the Australian Stock Exchange
- Standard margin lending facilities
- Superannuation, whether self-managed, personal super or corporate super

Remuneration

Tom is remunerated by a base salary and bonus.

Benefits, interest, and associations

Tom does not have any related parties, shareholdings or referral arrangements that may influence the advice provided to you.

Tom’s Office & Contact Details

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