Adviser Profile

Jonathan O'Sullivan

Senior Wealth Adviser

BA DFP Grad Dip Acc & Corp Finance

Profile

Jon O'Sullivan, with over a decade of experience in finance, has harboured a keen fascination for money and markets since his early years. His commitment lies in facilitating Australians to plan meticulously as they savour the essence of their lives. Recognizing the significance of open dialogues about what may initially appear as intricate financial challenges, Jon believes that, with the right strategic planning, seemingly complex problems can find straightforward solutions.

Jon takes pleasure in engaging with clients, delving into the intricacies of their financial landscapes, and, most significantly, understanding the unique circumstances that shape their financial journey.

Through collaborative efforts, Jon and his clients forge comprehensive plans that not only ensure financial security but also instill a revitalized sense of comfort in their overall financial well-being.

Outside the realm of finance, Jon immerses himself in quality family time, actively participating in community initiatives, and embarking on overseas travels to reconnect with long-lost friends. During weekends, one might spot him passionately coaching or cheering on his son's sports teams.

Jon's background

Jon O'Sullivan, a graduate from University College Cork, Ireland, achieved his Bachelor of Arts with a major in Economics in 2007. Eager to broaden his knowledge, he pursued further education, obtaining a Post Graduate Diploma in Accounting and Corporate Finance in 2008. Jon continued his academic journey by completing a Diploma of Financial Planning and obtaining his Listed Securities and Managed Investment RG146 Accreditation.

Upon relocating to Australia, Jon embarked on his finance career as an associate in a boutique financial planning practice. Throughout this period, he remained committed to continuous education and skill development, recognizing the paramount importance of staying abreast of the ever-changing global economy and contemporary events.

With family and friends residing in the UK and Ireland, Jon maintains a strong connection with international financial developments.

In 2016, Jon transitioned into the role of an adviser with Australia's largest banking institution. Over the years, he has cultivated relationships with a diverse range of clients and established extensive connections with highly skilled professionals and referral partners. In 2023, Jon joined The Wealth Designers, bringing his wealth of experience and expertise to the team.

Your Adviser & Practice

Jonathan O’Sullivan is an Authorised Representative (No. 001248480) of TWD Licensee Services Pty Ltd (ABN 88 605 064 480 AFSL 475964). Jonathan O’Sullivan provides advice and services on behalf of the following Corporate Authorised Representatives of TWD Licensee Services Pty Ltd:

- TWD Australia Pty Ltd, Corporate Authorised Representative (No. 1266864)
- TWD Solutions Pty Ltd, Corporate Authorised Representative (No. 1305381)
- SW-TWD Wealth Pty Ltd, Corporate Authorised Representative (No. 1266742)

TWD Australia Pty Ltd, TWD Solutions Pty Ltd and SW-TWD Wealth Pty Ltd are part of The Wealth Designers Group of companies and provide a range of financial advice and assistance to help people grow, manage, and protect their wealth. Your adviser provides expert professional advice to help you achieve what you want out of life.

Jonathan O’Sullivan is an employee and as a result, will receive a salary. He may also receive a performance bonus which may be based on certain performance criteria, such as client retention, compliance, and the revenue he generates, as well as other factors. The bonus potential does not influence the advice, or any recommendations made.

If you would like to make time to discuss your financial needs and objectives in more detail, please contact Jonathan O’Sullivan on 1300 893 000 or Jon.OSullivan@twd.com.au.

Memberships

- Financial Advice Association Australia (FAAA)

Qualifications

- Graduate Diploma of Accounting & Corporate Finance
- Bachelor of Arts Degree (Economics)
- Diploma of Financial Planning (DFP)
- Listed Securities and Managed Investment Accreditation (RG146)

Jon's Expertise and Skills

- Wealth creation strategies including savings plans
- Personal cashflow planning & budgeting
- Personal Insurance Strategies
- Superannuation advice including contribution and consolidation strategies
- Retirement planning and pension strategies
- Centrelink/DVA advice
- Debt management & reduction strategies
- Tax planning
- Portfolio construction and management
- Estate planning advice

Advice Your Adviser Can Provide

STRATEGIES

- Investment strategies including gearing and savings plans
- Budget and cash flow planning
- Debt management
- Superannuation advice, including salary sacrifice and consolidation strategies
- Personal insurance strategies
- Centrelink / DVA advice
- Retirement planning advice
- Estate planning advice
- Advice on ownership and structures e.g. discretionary and family trusts, Self-Managed Superannuation Funds
- Philanthropy & personal charitable giving strategies
- Portfolio review services
- Ongoing advisory services
- Referrals to specialists e.g. accountants, solicitors, mortgage and general insurance brokers

PRODUCTS

- Basic and non-basic deposit products
- Government debentures, stocks or bonds
- Investment life insurance products or life risk insurance products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Securities
- Superannuation
- Standard margin lending facilities

TWD Australia Referral Arrangements

We also have a referral relationship with Lincolns Pty Ltd as Trustee for The Taylor Family Trust & The Prior Family Trust & The Meaton Business Trust & The Spenceley Family Trust T/A Lincolns Beyond Numb3rs (Lincolns). If you are referred to us by Lincolns, we will pay them 15% of all fees you pay to TWD Australia Pty Ltd.

This Adviser Profile should be read in conjunction with the TWD Licensee Services Pty Ltd Financial Services Guide (FSG). Distribution of this Adviser Profile by the Authorised Representative/ Adviser has been approved by TWD Licensee Services Pty Ltd.

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