# Adviser Profile

## David Hatton

Senior Wealth Adviser

*B.Comm. Adv Dip FS (FP)*

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The Wealth Designers.

# Profile

David is a creative thinker who enjoys identifying opportunities and solutions for his clients.

David is driven to delivering exceptional outcomes for his clients that help improve their lives, no matter where they are on their financial journey. A passionate adviser since 2005, his mission is making the complex simple, so his clients can easily understand and rely on his advice, making the best possible decisions for the future.

David loves his role and the important relationships which develop through the The Wealth Designer’s unique process. He takes the time to listen to and truly understand clients’ situation and their goals and dreams before embarking on the plan to make them a reality.

# David's background

David graduated from Murdoch University in Western Australia with a Bachelor of Commerce, majoring in Finance. He has completed his Advanced Diploma of Financial Services and has nearly two decades' worth of experience in financial advice.

He is a member of the Association of Financial Advisers and is well-versed in all facets of Investment and Wealth Creation, Superannuation and Retirement Planning and Wealth Protection, and Insurance.

David has worked in large and boutique firms in the advice industry since 2001. He joined The Wealth Designers in 2017 and is proud to be part of a company that believes in building lives with both money and meaning.

Outside of work, David is a proud dad and devoted husband, who loves music, travel, and sport.

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# Your Adviser & Practice

David Hatton is an Authorised Representative (No. 234527) of TWD Licensee Services Pty Ltd (ABN 88 605 064 480 AFSL 475964). David Hatton 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.

David Hatton 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 David Hatton on 1300 893 000 or David.Hatton@twd.com.au.

# Qualifications

- Bachelor of Commerce
- Advanced Diploma of Financial Planning

# Memberships

- Financial Advice Association Australia (FAAA)

# David's expertise and skills

- Financial complexity management
- Superannuation structures and self-managed super funds
- Contribution strategies
- Retirement planning and pension strategies
- Tax management & planning
- Portfolio construction and active management
- Divorce settlement planning and advice
- Personal insurances
- Personal cash flow planning & budgeting
- Asset projections & analysis
- Debt management & reduction strategies
- Estate planning

# 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
- 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) and Separately Managed Accounts (SMAs)
- Retirement savings accounts
- Securities
- Superannuation
- Standard margin lending facilities

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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