Adviser Profile

Joshua Chapman

Wealth Adviser

SSA® BComm MFinPlan

TheWealthDesigners. LIVE WELL.™

11 November 2025

Profile

Joshua is deeply passionate about helping individuals achieve their fullest potential. His dedication to optimising clients' financial situations motivates him to maintain a strong commitment to building lasting, long-term relationships.

Joshua takes a hands-on, personalised approach to advising clients. He works closely with clients to understand their unique goals and challenges, crafting tailored strategies that are not only practical but also sustainable for long-term success.

With a focus on collaborative processes Joshua ensures that clients are equipped with the tools and knowledge they need to thrive in an ever-changing landscape.

It is incredibly rewarding for Joshua to witness clients successfully reach their goals and objectives, knowing that their hard work and collaborative efforts have resulted in tangible success.

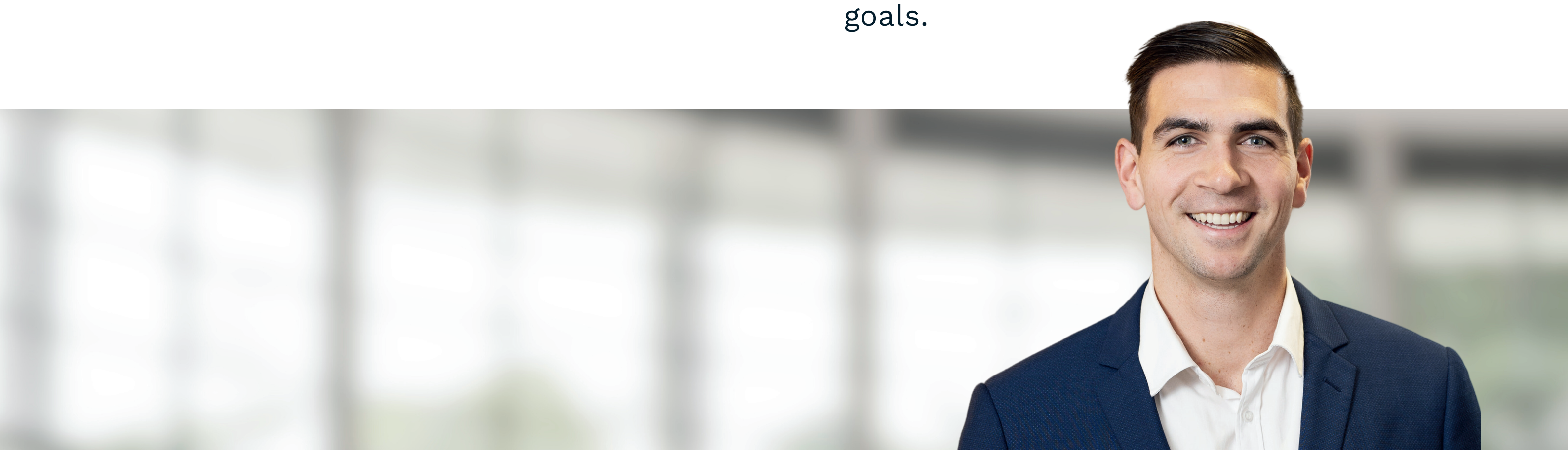
Joshua's background

Joshua joined The Wealth Designers in January 2021 in an advisory support role, where he expanded his knowledge and experience by collaborating closely with seasoned advisers. Joshua holds a Bachelor of Commerce, majoring in Accounting from Curtin University and has completed his Master of Financial Planning. He has also received SMSF Specialist Adviser certification (SSA®) with the Self-Managed Super Fund Professionals Association.

Joshua is passionate about helping people achieve their full potential.

Joshua’s diverse background includes global hotel management and teaching in various industries, where he honed his leadership skills and built lasting relationships with international clients. He has worked with a diverse range of clients, from individuals to small-medium businesses, helping them navigate complex challenges and achieve their personal and professional goals.

Joshua believes that success is unique to each individual and that behaviours drive success. He is dedicated to working closely with clients to develop comprehensive plans to achieve their goals.



Your Adviser & Practice

Joshua Chapman is an Authorised Representative (No. 1309301) of TWD Licensee Services Pty Ltd (ABN 88 605 064 480 AFSL 475964). Joshua 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.

Joshua 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 Joshua on 1300 893 000 or Joshua.Chapman@twd.com.au.

Memberships

- Self-Managed Super Fund (SMSF) Association
- Financial Advice Association Australia (FAAA)

Qualifications

- Bachelor of Commerce (B.Comm)
- Master of Financial Planning (MFinPlan)
- SMSF Specialist Advisor (SSA®)

Joshua'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
- 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