Adviser Profile

Joshua Rendell

Wealth Adviser

B.Comm GradDipFinPlan
001310449

Profile

Joshua is genuinely passionate about helping people achieve their fullest potential. He's dedicated to finding practical ways to optimise his clients' financial situations and is committed to building strong, lasting relationships based on trust and understanding.

Taking a hands-on and personalised approach, Joshua works closely with each client to understand their goals, challenges, and what truly matters to them. He focuses on creating tailored strategies that are realistic, adaptable, and designed to deliver long-term success.

He's particularly passionate about financial modelling, using it to give clients a clear, visual view of how they're tracking towards their goals. This not only helps bring their financial plan to life but also builds confidence in the path ahead.

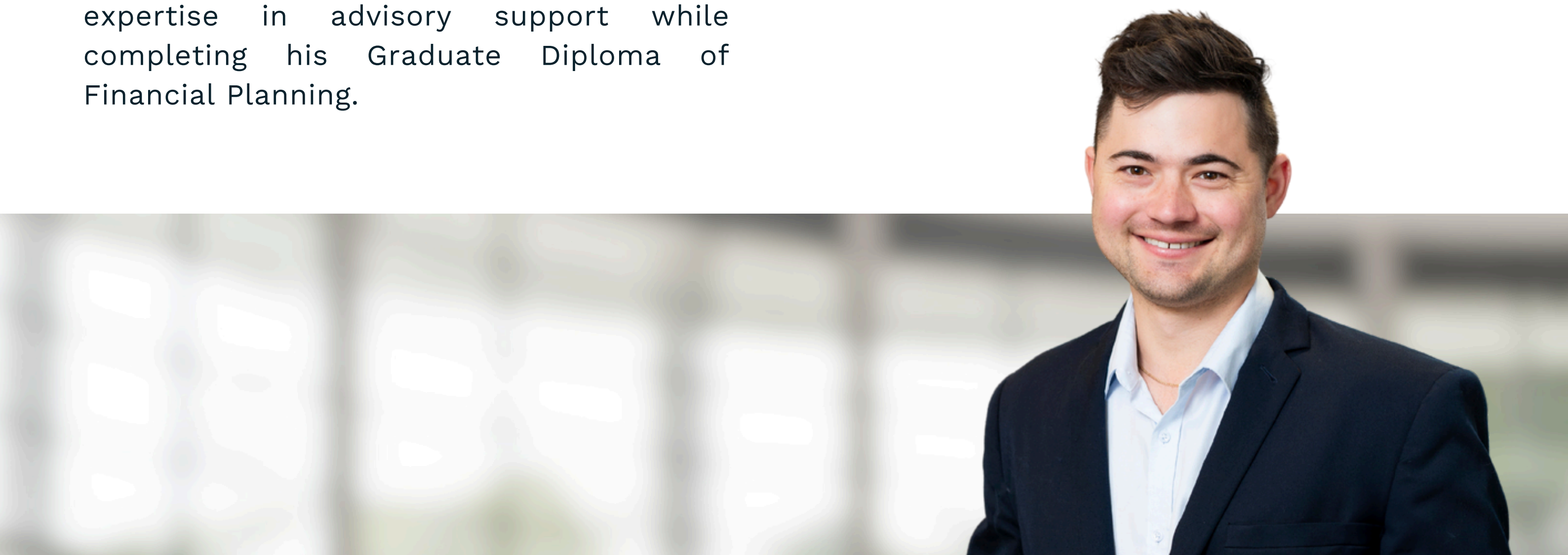
For Joshua, advice goes far beyond managing wealth, it's about helping clients strike the right balance between living well today and feeling secure about their future. Seeing clients achieve meaningful progress and knowing he's played a part in their success is what drives him every day.

Joshua's background

Joshua graduated from the University of Western Australia, holding a Bachelor of Commerce with majors in Finance and Communications.

His diverse professional background includes roles in Hospitality and Fitness have honed his leadership and interpersonal skills. Joshua embarked on his financial career in 2020, working as an Associate with two firms to develop his expertise in advisory support while completing his Graduate Diploma of Financial Planning.

In December 2022, he joined The Wealth Designers, where he's demonstrated remarkable growth by progressing from Associate to Wealth Adviser. His journey showcases a steadfast dedication and exceptional proficiency in the financial sector.



Your Adviser & Practice

Joshua Rendell is an Authorised Representative (No. 001310449) 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.Rendell@twd.com.au.

Memberships

- Financial Advice Association Australia (FAAA)

Qualifications

- Bachelor of Commerce
- Graduate Diploma of Financial Planning

Joshua’s expertise and skills

- Financial complexity management
- 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
- Philanthropy and charitable giving
- 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
- 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 – excluding self-managed 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.