

Adviser Profile

James Lonergan

James Lonergan CFP® (ASIC No. 296603)

Authorised representative of Charter Financial Planning (AFSL No. 234665)

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Education and Qualifications

Adv.Dip.FS, Grad.Dip.App.Fin (Financial Planning), CERTIFIED FINANCIAL PLANNER®



Experience

James Lonergan has worked in financial services for over 17 years. He joined Goldhurst in 2003 and is now a Director of the company. His experience as a Financial Planner has allowed him to help clients to build and protect their wealth. As a Certified Financial Planner® professional with an Advanced Diploma of Financial Services and a Graduate Diploma of Applied Finance (Financial Planning) he is able to provide advice to assist a wide variety of clients with a broad range of their financial planning needs. He cares personally about his clients and enjoys helping people. At Goldhurst Wealth Management we like to know we have made our clients' lives better. Our team is focused on ensuring we 'Listen' to our clients, 'Plan' their personalised strategies, and give ongoing 'Care' to reach their goals.

Memberships

Financial Planning Association (FPA)

Advice I can provide

I can provide you with strategic advice as well as arrange the types of financial products listed below.

I can help you to identify the types of services and products that will be appropriate to meet your financial goals. In addition, you can choose whether to receive advice about a range of needs all at once, or we can provide advice about only those needs that are most important to you so that your most important goals are achieved first. Further advice can then be provided over time about any other needs or goals as required.

Strategies

- Guidance on budgeting and goal setting
- Savings and wealth creation strategies
- Investment planning
- Superannuation planning
- Pre-retirement planning
- Retirement planning
- Estate planning considerations
- Centrelink planning
- Risk and insurance analysis
- Business succession planning
- Salary packaging advice
- Gearing strategies

Products

- Deposit and payment products (for example term deposits, cash management accounts and non-cash payment products)
- First home saver accounts
- Retirement income streams
- Direct fixed interest
- Retail & wholesale managed investment schemes
- Socially responsible investments
- Hedge funds
- Master trust products
- Superannuation products
- Personal and group insurance
- Limited investment guarantees
- Business succession insurance
- Self managed super funds (including limited recourse borrowing arrangements)

Please refer to the Financial Service Guide (FSG) for further information on how I am paid and my relationships and associations.