

Jim Fenwicke

Wealth Adviser



Jim Fenwicke

CFP®, LRS®, AEPS®, F Fin
BEc, GDipAppFin,
Adv.Dip.FS(FP), Dip.FS(FP)

Jim is a financial markets professional with over 25 years' experience in roles including strategic financial planning, trading, back office operations, compliance and management. He has worked for some of Australia's leading financial institutions including Macquarie Bank and National Australia Bank.

Jim is a Certified Financial Planner professional member of the Financial Planning Association of Australia and an accredited Life Risk Specialist and Estate Planning Strategist. He holds a BEc from Sydney University; a Graduate Diploma of Applied Finance and Investment; an Advanced Diploma of Financial Planning and is a Fellow of the Financial Services Institute of Australasia (FFin).

Jim is passionate about helping people to achieve their lifestyle goals and life ambitions. Modern living distracts people from what is really important to them and robs them of the time needed to make increasingly complex financial decisions. Jim works with clients to build the financial resources they need to achieve better balance in their lives.

Jim is married with 3 children and away from work enjoys rugby, golf and yoga.

You can contact Jim at:

Phone	02 8912 1910
Address	L2, 53 Berry Street, North Sydney NSW 2060
Postal address	PO Box 6491, North Sydney NSW 2059
Email	jim@fenwickefinancial.com.au
Website	www.fenwickefinancial.com.au

Fenwicke Financial

Fenwicke Financial is wholly owned by its founder and principal Jim Fenwicke. The branding of the business has been evolving since it was first started in 2009 and the recent change in April 2016 reflects the continued growth of the business as well as our desire to be fully in control of our processes. By co-locating and co-operating with another financial planning firm our staff and clients have access to the knowledge and experience of other financial planning professionals, which assists us with strategy formulation, portfolio construction & management and in ensuring that the office is appropriately staffed at all times.

Jim Fenwicke is an authorised representative and Fenwicke Financial Services Pty Ltd trading as Fenwicke Financial is a corporate authorised representative of Financial Wisdom ABN 70 006 646 108 AFSL 231138