

MEET

# Jim Cresnar

YOUR FINANCIAL ADVISER

## What experience does your financial planner have?

Jim comes from a large institution background with more than 20 years' experience. Jim is passionate about helping his clients to set, achieve and protect their financial goals, and secure the future and financial freedom they desire. He has a particular interest and expertise in the technical and investment strategies for establishing and managing hard working self-managed super funds (SMSF).

Jim was previously a Senior Financial Adviser, providing strategic investment advice to High Net Worth and Business clients. During this time Jim specialised in the distinct financial needs of medical and healthcare professionals and has been providing advice to medical practitioners and specialists for over 10 years. He understands and can help navigate the complex financial rules of the healthcare industry to ensure that his clients minimise tax, grow wealth, make their income work harder and protect their wealth.

## What qualifications and professional memberships does your adviser have?

- Advanced Diploma of Financial Services
- Bachelor of Arts (Economics)
- Practising member of the Financial Planning Association (FPA)

## Key areas that your financial planner specialises in:

### Wealth Creation

- Retirement
- Superannuation
- Investments
- Tax Effective Strategies
- Debt Management

### Wealth Protection

- Life Cover
- TPD
- Critical Illness
- Income Protection
- Super vs Non Super
- Tax Deductibility

### Wealth Transfer

- Wills & Estate Planning
- Power of Attorney (Enduring)
- Medical Authority
- Testamentary Trusts
- Binding Nominations



## How can you contact your financial adviser?

### Jim Cresnar

Merit Wealth Pty Ltd

Merit Planning (NCC) Pty Ltd

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**merit**planning  
NCC

**Call Jim today for an obligation free consultation!**

Jim Cresnar is an Authorised Representative (No.1004802) of Merit Wealth Pty Ltd. ABN 89 125 557 002, which operates under AFSL No. 409361.

