BlueRock
Private Wealth

Business Profile

Blue Rock Private Wealth Pty Ltd is a Corporate Authorised Representative of BR Advice Pty Ltd (AFSL 488655).

BlueRock

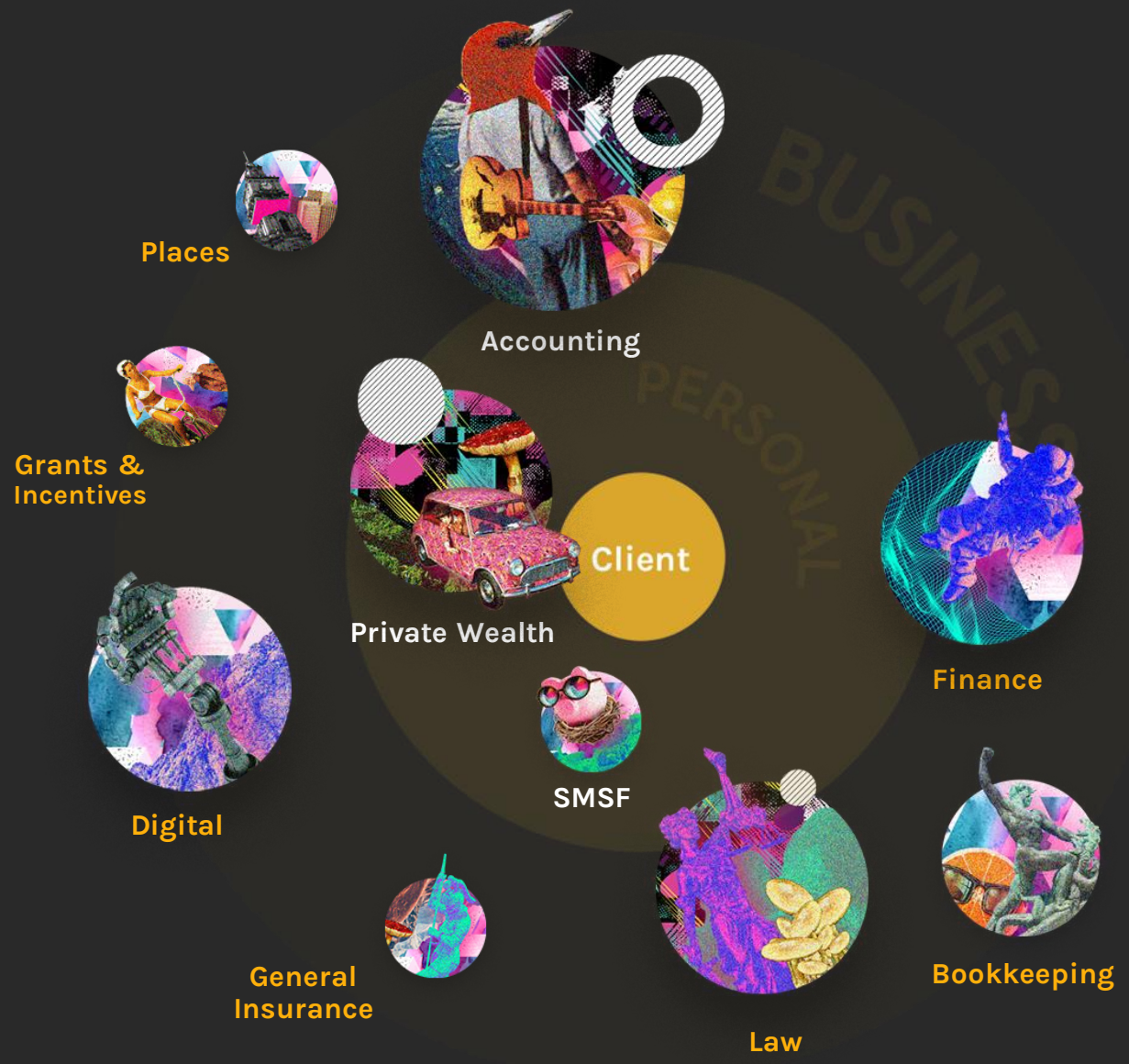
About BlueRock

We started our journey on 1 July 2008 with 8 staff. BlueRock was created to partner with entrepreneurial business owners & families who want exceptional people doing exceptional things. We continue to evolve in that state of mind.

We are an entrepreneurial advisory firm that helps our clients in all aspects of running their business and personal wealth. Whether it's providing tax and accounting advice, creating a lease, financing and building a start-up, creating a digital strategy for growth or planning a wealth creation strategy.

Our team now comprises over 160 staff across 10 divisions. We understand that there is a direct correlation between the ilk of our people, and client outcomes and experience.

BlueRock


BUSINESS
PERSONAL
Client
Accounting
Private Wealth
Finance
Bookkeeping
Law
General Insurance
Digital
SMSF
Grants & Incentives
Places

BlueRock

BlueRock Private Wealth was formed in early 2014 as the third division of the BlueRock community.

Our passion lies in becoming a trusted partner in our clients' lives. We are free from the shackles of being linked to a financial institution, we embrace technology, and we are unwavering in our quest to deliver market leading financial advice.

Our process starts and finishes with your goals. We deep dive into the specifics, and more importantly, why they are important to you. This is followed by the formation of a strategic plan focused on execution, across all aspects of your world.

Our holistic approach to financial advice means we leave no stone unturned to deliver you peace of mind about your family's financial future.

BlueRock

Goals Based Financial Planning

The essence of what financial advice is meant to be – strategic guidance and a financial roadmap linked to your goals.

Superannuation

In-house expertise in all aspects of superannuation ensures we proactively leverage its tax efficient superpowers.

Investment Advice

Collaborate on an investment strategy that marries your financial goals with your risk appetite. We are self licensed and not beholden to anyone but our clients.

Cashflow

We can help you formulate a cashflow strategy linked to your strategic plan, and help you track your progress via smart technology.

Life Insurance

You can't insure for the emotional impact of an unexpected life event, but you can buy financial peace of mind for your business and family.

Estate Planning

The right assets, to the right people, at the right time. We project manage the intricacies of your Will and Business Succession plan to make the complex feel simple.

Your Private Wealth Team

We are a team of professionals dedicated to delivering peace of mind for our clients via the provision of tailored financial advice. The skills et across our team gives us the capacity to focus our attention on our own individual strengths and specialisations rather than trying to be all things to all people. Our advisory team primarily focuses on client relationships and the formation and oversight of our client's unique financial plans, whilst our clients service team ensures our advice is meticulously implemented.

Adam Morse CFP®
Managing Director

Bedri Sainovski
Strategic Partnerships Manager

Bernadine Ophelia
Private Client Manager (Strategic Advice)

Brigitta Nadya
Client Service Manager

Carolina Sainovski
Private Client Adviser (Life Insurance)

Daniel Zaffino
Private Client Adviser (Strategic Advice)

Emma Ryan
Case Manager (Life Insurance)

Gareth de Maid CFP®
Director (Investment)

Iain Williamson
Private Client Associate (Life Insurance)

Jack Prendeville
Private Client Associate (Strategic Advice)

Kaitlin Beattie
Operations Coordinator

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Kate Festini
Practice Manager

Kristina Low CFP®
Head of Advice

Lauren Isles
Private Client Adviser
(Strategic Advice)

Leigh Fernando CFP®
Director
(Strategic Advice)

Neil Jackson
Private Client Adviser
(Life Insurance)

Nicholas Siemensma
Private Client Manager
(Investment)

Richie Goodey
Private Client Manager
(Strategic Advice)

Ryan Williams
Private Client Manager
(Family Advisory & Succession)

Samantha Durdin CFP®
Private Client Adviser
(Strategic Advice)

Shannon Williams
Private Client Manager
(Strategic Advice)

BlueRock

Our Values

Be Relentless

In finding a great solution and being the best we can be

Be Proactive

In supporting each other and our clients

Be Responsible

For our decisions, and our mistakes

Be Honest

In the way we communicate
Be a straight talker

Be Innovative

In everything we do
Look for better ways to get the job done

Be Positive

Look for opportunities to have fun and have strong meaningful relationships

BlueRock

Thank you for taking the time to engage with BlueRock Private Wealth and for the opportunity to work with you.

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