

My Profile



Daniel McAllister

BBus MFinPlan AR No. 321393
Personal Client Adviser

How I can help our clients

I can provide personal financial advice in the following areas:

- Superannuation
- Pre and Post Retirement Planning
- Wealth Creation
- Investment and Tax-Effective Strategies
- Personal Insurance
- Income Protection



Experience

I have over 20 years' experience in the finance and banking sector, including over 16 years as a licensed financial adviser.

Before coming to FinNest Financial, I was a senior financial adviser with larger advice firms such as AMP, Morgans Stockbroking & Team Leader at Challenger and a senior adviser in boutique financial planning firms.

Qualifications

I hold a Masters Of Financial Planning, and a Bachelor of Business degree from Southern Cross University.

Additional Information

I am adept at working with our valued clients to guide them through the maze of financial complexity with clarity and confidence. I derive great satisfaction from working collaboratively with clients on an ongoing basis to help you reach your financial goals. I have a number of advice areas I specialise in to drive the best outcomes for our clients, including superannuation and self-managed superannuation, personal insurance, retirement planning and investment strategies. .



PLAN • GROW • PROTECT

To find out how FinNest Financial can help you plan, grow and protect your financial future, please feel free to contact us:

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