

Tony Lim

FINANCIAL ADVISOR



Tony began his career as a Paraplanner at an industry super fund where he excelled in distilling complex financial concepts into clear and concise advice to members. He joined BG Private in 2021 as an Associate Advisor before becoming a Financial Advisor in 2023.

Tony is passionate about helping individuals and families achieve their financial goals. He has a strong understanding of various financial planning components, including investment management.

He loves helping people in the pre-retirement stage with strategies that take advantage of the last decade or so of their working lives to maximise their position as they transition to retirement and beyond.

He also enjoys post-retirement financial planning as he is able to give clients peace of mind that they will be able to continue to enjoy their lifestyles by implementing some clever strategies.

Internally, Tony is seen as a role model and mentor with more junior staff turning to him with any questions they have.

Outside of work, Tony spends his time playing badminton and tennis. He is also an avid fan of the NBA and supports the Houston Rockets.

View my Financial Services Guide here:

www.bgprivate.com.au/financial-services-guide

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- Advanced Diploma of Financial Planning

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- Retirement planning

Specialisations

- Pre-retirees
- Retirees

+61 3 9810 0700

info@bgprivate.com.au

801 Glenferrie Road, Hawthorn VIC 3122

Locked Bag 50 Hawthorn VIC 3122

bgprivate.com.au