John Green

FINANCIAL ADVISOR

John has more than 24 years of experience in financial planning and has become highly specialised in personal and business insurance over the past 20 years.

He has provided advice to countless families, business owners, executives, the self-employed and general employees, and has cultivated a deep understanding of the needs of each group.

He works to understand each client's unique financial situation and goals, and then guides them through the process of selecting insurance types, cover amounts and products. Clients gain the peace of mind that they will be protected during unexpected events.

John also has a depth of experience in evaluating insurance policies in terms of quality and value. This ensures clients can feel confident that they have the appropriate level of cover for their needs.

Although the insurance claims process can be complex, John works with the insurer on behalf of the client to achieve the best possible outcome. Since 2006, John has successfully managed the policy claims process for many dozens of clients.

There are not many people who can do what John does in the insurance space with his level of expertise, knowledge and integrity, and he has become the go-to person as the firm's subject matter expert.

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Qualifications

- Bachelor of Commerce and Administration
- Diploma of Financial Planning

Highly regarded in

- Personal insurances (including income protection, TPD, life insurance and trauma cover)
- Business insurances (including buy/sell, key person and business loan clearance)
- Claims management
- Cover assessment

Specialisations

- Business partnerships
- Professionals
- Business owners
- Self-employed people
- Families

Private

For Today, Tomorrow & Beyond.

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He also has a background in business banking, commercial property financing and general financial planning meaning he can analyse financial information on behalf of his business clients during the insurance setup process.

Outside of work, John loves keeping fit, regularly cycling 20-30 kilometers along the Yarra Trail, and is also committed to long walks after work. He also loves going to the theatre and reading history books.

View my Financial Services Guide here:
www.bgprivate.com.au/financial-services-guide

Experiences of note

- John successfully completed a complex claim under a Total Permanent Disablement policy owned by the client in superannuation. The claims process involved navigating technicalities around superannuation insurance rules, policy definitions, and Claims Code of Conduct response timeframes.
- John helped a client navigate a complex business insurance case, including the calculation and value analysis of buy/sell, key person and business loan clearance covers, and also assessed and arranged the personal insurances of the business directors.

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