Adrian D'Mello CFP®

FINANCIAL ADVISOR

Adrian has been a Financial Advisor at BG Private for more than five years.

He started his career at an industry super fund at the peak of the GFC, helping members navigate those challenging times. He then joined one of Australia's Big 4 banks as a Financial Advisor and then spent several years in regional Victoria where he predominantly advised farming clients.

Adrian is an experienced professional who guides clients throughout the various stages of their financial lives. Younger professionals wanting to set themselves up for lifelong financial security. Pre-retirees who want to maximise the final years of their working lives to ensure they have sufficient funds to enjoy retirement. Retirees who want to enjoy the fruits of their labour while knowing their finances are in order.

In addition, Adrian is an aged care specialist, helping families navigate the complex aged care landscape. This includes matters relating to the cost of care, Centrelink, managing assets like the family home, and ensuring adequate cash flow.

It is rare to find an advisor who can also provide advice regarding Defined Benefit Schemes and complex structured investments.

His clients appreciate his patience and understanding nature. He takes the time to understand each client's individual needs and recommend the best strategy to maximise their personal circumstance.

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Qualifications

- Certified Financial Planner®
- Master of Financial Planning
- Advanced Diploma of Financial Planning
- Bachelor of Commerce
- Bachelor of Information Systems

Memberships

- Member of Financial Advice Association of Australia (FAAA)

Highly regarded in

- Retirement planning
- Budget planning
- Insurance
- Centrelink
- Aged care
- Investments
- Margin lending and gearing
- Superannuation (including SMSFs)

Private

For Today, Tomorrow & Beyond.

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bgprivate.com.au

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When not advising clients, Adrian has a wide circle of friends and an even wider set of interests. He has an impressive whisky collection and loves hiking in the Dandenongs. He’s also a vocal supporter – with reasonable expectations – of the Essendon Football Club, which is not for the faint-hearted!

View my Financial Services Guide here:
bgprivate.com.au/client-hub/financial-services-guides

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