

Rocky Sorrenti CPA

PARTNER | FINANCIAL ADVISOR

Financial Planning
Accounting & Business Advisory



Rocky Sorrenti is a Partner of BG Private's Accounting & Business Advisory and Financial Planning divisions. He also sits on the firm's Advisory Board, which oversees our long-term strategy.

He has 38 years of experience in providing tax and financial planning advice, including four years at the Australian Taxation Office and five years as a Senior Taxation Consultant at Price Waterhouse.

After establishing his own successful accounting firm, Rocky's firm merged with BG Private in 2007. His task was to grow the Financial Planning division, which now has 18 team members.

Rocky is a widely respected financial advisor who has provided ongoing strategic advice to hundreds of individuals, family groups and businesses over the decades.

As Rocky always says: Life is full of unknowns. And while we can't be certain of future earnings, interest rates, government policies and even our own health, those who put a financial plan in place will have a lot more money when they come to retire than those who never get around to it.

His background in accounting means that clients also benefit from the wealth of experience Rocky has in advising on the tax implications of business structures (including trusts, SMSFs and investment companies).

Experienced in business succession planning, Rocky works with estate planning lawyers to help clients ensure their legacy is protected and that their wealth is passed on to the next generation.

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Qualifications

- Bachelor of Business

Memberships

- Member of CPA Australia (Financial Planning Specialist)
- Registered Tax Agent

Highly regarded in

- Business structure advice
- Self-managed super funds
- Investment advice
- Retirement planning
- Succession planning

Specialisations

- Family groups and businesses
- High-net worth individuals and family groups
- Private equity
- Charitable funds



For Today, Tomorrow & Beyond.

+61 3 9810 0700
info@bgprivate.com.au
801 Glenferrie Road, Hawthorn VIC 3122
Locked Bag 50 Hawthorn VIC 3122
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Recently, Rocky helped create Platinum – a wholesale offering for sophisticated investors. This has given clients exciting new ways to grow their wealth through investment opportunities not generally available.

Rocky feels very strongly that his team of financial advisors provide the highest levels of client service and care and has established processes and protocols to deliver this.

Outside of work, Rocky takes part in a local tennis competition, enjoys golf trips and goes to most 'Pies' matches – in good times and bad. He also sits on the Advisory Board of Civitas Services Australia.

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

Experiences of note

- Rocky was closely involved in establishing and managing the Irene Phelps Charitable Trust as part of the client's estate planning wishes. Established about 10 years ago, the Trust has donated over \$2 million to the client's desired charitable causes thus far. It is an amazing example of a legacy that continues to support those causes that were close to our client's heart.

Financial advice is provided by advisors who are Authorised Representative of BG Wealth Management Pty Ltd, ABN 14 127 520 558, AFSL No. 496348. BG Private Clients Pty Ltd, ABN 90 714 046 150 is a Corporate Authorised Representative of BG Wealth Management Pty Ltd. This information is of a general nature only and has been provided without taking account of your objectives, financial situation or needs. If the advice relates to the acquisition, or possible acquisition, of a particular financial product, the client should obtain a Product Disclosure Statement (PDS) (if required) relating to the product and consider the PDS before making any decision about whether to acquire the product.



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