

Allan Rozario CFP®, SSA®

FINANCIAL ADVISOR



Allan began his career as a financial advisor with one of Australia's largest wealth management firms, working closely with pre-retirees and retirees while also guiding young families to build wealth for the future. Over the years, he has also provided tailored financial advice to high-net-worth individuals and worked with C-suite executives, helping them navigate complex financial decisions. He later moved into Remediation, where he helped correct the impact of poor financial advice and ensured clients received fair outcomes.

Today, Allan supports clients at all stages of life, with a strong belief in the transformative impact of a well-structured financial plan. Whether it's buying a first property, travelling, building long-term wealth, protecting family and lifestyle, or retiring with peace of mind, he is passionate about helping people achieve their goals. With extensive experience in both providing financial advice and reviewing hundreds of strategies, he brings strong technical expertise and a holistic approach across superannuation, personal insurance, investments, retirement planning, and debt management.

His clients appreciate his honesty, integrity, and down-to-earth approach, along with the professionalism, transparency and care they expect from a trusted financial advisor.

Outside of work, he enjoys travelling, experiencing new cultures and photography. When not travelling or taking photos you will find him reading a book, watching sports, or playing badminton.

View my Financial Services Guide [here](#).

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For Today, Tomorrow & Beyond.

Qualifications

- Master of Financial Planning
- Master of Commerce (Finance)
- Certified Financial Planner®
- SMSF Specialist Advisor
- Accredited Listed Product Advisor

Memberships

- Member of Financial Advice Association of Australia (FAAA)
- Member of the SMSF Association

Highly regarded in

- Budgeting & Cash Flow Management
- Superannuation (Including SMSF)
- Insurance
- Investments
- Retirement Planning
- Margin lending and gearing

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