



Integrity

FINANCIAL ADVISORY



DAVID FORREST

DIRECTOR

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Authorised Representative Number 298317

David is a member of the professional association of Certified Practising Accountants (CPA).

David has the following qualifications:

- ▶ Bachelor of Economics with Accounting Major
- ▶ Master of Business Administration (MBA)
- ▶ Certified Practising Accountant (CPA)
- ▶ Graduate Diploma in Applied Finance and Investment

If you would like to discuss your situation with David, we invite you to take advantage of a no obligation, free consultation to find out whether a relationship with Integrity maybe for you.

David has been in the Financial Services Industry for almost 30 years. He was one of the founding Directors of the successful Financial Planning and Stockbroking Practice, Henderson Gregory Forrest, for a decade. Prior to that, he held senior roles in companies such as ING, KPMG Accountants and AMP. David was previously Chairman of OAMP Superannuation Trustee Board and currently serves as an independent Board Director for several companies. His extensive experience in all forms of superannuation, including Self Managed Super Funds (SMSF), stockbroking with a focus on direct share investment, taxation/remuneration planning, Centrelink, Aged Care and business management, equip him to advise expertly on all aspects of Financial Planning. Those with a particular interest in superannuation salary packaging, direct share investment or applying for the Centrelink Pension will find him an indispensable ally in formulating and implementing creative, logical and simple wealth creation strategies.

His strong client service focus, combined with his extensive knowledge and experience, underpins the Integrity Financial Advisory Team.

David is authorised by PWM Advisor Services to advise on the following financial services and products:

- ▶ Deposit and Payment Products - including basic and non basic deposits
- ▶ Government Debentures, Stocks and Bonds
- ▶ Life Products - Investment life insurance & life risk insurance products
- ▶ Management Investment Schemes including Investor Director Portfolio Services (IDPS)
- ▶ Margin Lending Facility
- ▶ Retirement saving account products
- ▶ Securities
- ▶ Superannuation and Self Managed Super Funds

KEY SPECIALISTS IN:

Integrity Financial Advisory is a privately owned Financial Planning Group which has its origins in 2003 with the formulation of Henderson Gregory Forrest, a specialist Financial Advisory and Stockbroking Firm.

The Advisers and Client Support Team of Integrity Financial Advisory have been recruited from the finance, stockbroking, investment management, superannuation and insurance industries. All are highly qualified and experienced professionals and maintain continuing professional and educational standards as required by ASIC compliance requirements.

Strategic Advice

- Structuring – Partnerships, Companies, Trusts & Superannuation Funds
- Risk Profiling & Asset Allocation Review
- Gearing
- Tax Planning
- Remuneration Packaging
- Debt Management

Investment Advice

- Direct Shares
- Wholesale & Retail Managed Funds
- Master Trusts
- Independent research and economic overview of individual asset classes and underlying assets
- Portfolio Administration Platform
- Comprehensive & Consolidated Reporting

Retirement Planning

- Personal Superannuation Plans
- Employer Superannuation Funds
- Self Managed Superannuation Funds
- Super Pensions
- Transition to Retirement Pension Plans
- Capital & Cash Flow Projection & Management
- Centrelink & Age Pension Benefit Planning
- Aged Care Accommodation

Estate Planning (in conjunction with your Legal Adviser)

- Wills
- Enduring Powers of Attorney
- Enduring Powers of Guardianship
- Testamentary Trusts
- Inheritance Advice

Insurance

- Life
- Total & Permanent Disability
- Trauma
- Income Protection
- Business Expenses
- Key Person Insurance

Business Succession Planning (in conjunction with Taxation & Legal Professionals)

- Buy / Sell Arrangements
- Funding Structures
- Annual Reviews

Contact Us
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