



*Integrity  
Trust  
Expertise*

# Alison Williamson CFP LRS

## Representative Fiducian Financial Services

Alison is a Senior Certified Financial Planner (CFP), the Financial Planning Association's highest professional designation. She has been involved in the financial planning and advisory industry as a personal financial planner since 1986 and adopts a holistic approach to planning that encompasses debt management, retirement and pre-retirement planning, superannuation including Self Managed Super Funds and Pensions, insurance, wealth accumulation strategies and tax strategies.

In addition to her CFP designation, Alison holds the designation of Life Risk Specialist (LRS) practitioner with the Financial Planning Association. She has studied Economics, Insurance and English Law with the Chartered Insurance Institute of London and has completed a business management certificate with E.S.A.S in Brussels, Belgium. Alison also holds a Diploma of Financial Planning (DFP) from Deakin University.

Alison has considerable experience in assisting clients to identify objectives, understand their financial position and adopt an efficient and strategic plan to ultimately achieve the desired outcomes.

When not engaged in financial planning Alison enjoys spending time with her husband and three children, travelling, gardening and cooking.

Alison is authorised by Fiducian Financial Services Pty Ltd to provide you with financial planning services which includes advising and dealing in the following products:

- Retirement Planning;
- Budget and Cashflow Planning;
- Centrelink Benefits, other Government Benefits and Aged Care Assistance;
- Salary Packaging;
- Personal Superannuation;
- Employer Superannuation;
- Investments and Savings Plans;
- Debentures and Government Bonds;
- Deposit and Payment Products;
- Estate Planning;
- Securities;
- Life Risk Insurance within Superannuation;
- Credit assistance and Debt Management;
- Life Risk and Business Risk Insurance;
- Gearing and Margin Lending.

### Fiducian Financial Services

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