ADVISER PROFILE

Michael Patman

Senior Client Adviser of Patman Planning Pty Ltd
Authorised Representative No 320607 of Alere Private WealthPty Ltd AFSL No. 700382

Patman Planning Pty Ltd ABN: 50 679 522 868

Authorised Representative No. 001311521 of Alere Private Wealth Pty Ltd Australian Financial Services Licence No. 700382

Born and raised in country New South Wales, Michael moved to Brisbane years ago to progress his career in financial services. Michael has worked at three leading financial services companies in a variety of roles before purchasing his part of Whittaker Macnaught in 2013 after spending seven years with the firm.

With over 20 years' experience Michael strives to deliver exceptional advice outcomes for his clients through his thorough and proactive emphasis. Michael performs the role of senior client adviser and business principal.

Education, Qualifications & Memberships

- Graduate Diploma of Financial Planning
- Diploma of Financial Services (Financial Planning)
- ASX accredited adviser
- Aged Care Specialist
- Formal accreditations in listed securities, options, derivatives, investment lending, property and aged care