ADVISER PROFILE

Rocco Costa

Senior Client Adviser of Patman Planning Pty Ltd
Authorised Representative No 001240144 of Alere Private Wealth Pty 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.

Rocco joined Patman Planning in 2025 as a Senior Client Adviser with the primary goal of helping clients live their ideal life. Rocco enjoys working with people in all stages of their journey and is always ready to be a sounding board for their ideas, concerns, or questions.

Rocco has completed a Bachelor of Commerce with a major in Financial Planning and is a Certified Financial Planner. With over 10 years of experience in top financial planning firms, he combines strong technical knowledge and expertise to provide advice that maximizes the chance of achieving clients' goals. Rocco aims to make a meaningful positive difference in the lives of his clients.

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Education, Qualifications & Memberships

- Bachelor of Commerce (Financial Planning & Accounting) - Griffith University
- Self Managed Superannuation Fund (Certificate) - Kaplan