



Entrust

Adviser Profile

Matthew Reece

M.ACC, B.COMM

**Private Wealth Adviser
Representative (No. 468452)**

Matthew has worked within the financial services and wealth management industry for over a decade after joining Entrust in June 2008.

Matthew is a strong believer in tailored and personalised advice for his clients. This is emphasised in his team based philosophy combining Financial Planning, Portfolio Management and Portfolio Administration to create a comprehensive and bespoke solution to the WA community.

Matthew holds both a Bachelor of Commerce, majoring in Economics and Financial Planning, and a Masters of Accounting. Matthew attained both degrees with Curtin University and on both occasions graduated with distinction (representing academic excellence). In addition to his tertiary academic achievements Matthew also holds professional accreditations in Self-Managed Superannuation Funds and margin lending products. Matthew was also a national finalist for the Financial Adviser of the Year in the Young Leaders in Finance Awards 2018.

Matthew specialises in providing strategic and technical advice across a variety of investment structures, including; Self-Managed Superannuation Funds, Companies and Family Trusts. Through his excellent knowledge and experience he is able to understand what his clients are trying to achieve and how best to achieve it.

As a Representative of an Australian Financial Services Licensee, Matthew is supported by the infrastructure of Entrust. Entrust's unique operating structure and client service delivery was reinforced as a model of choice by Euroz Limited who acquired Entrust in 2015 to provide a 'best of breed' Wealth Management capability within their business.



Matthew is a strong advocate towards giving back to the WA community. He is an ongoing volunteer for Conquer Cystic Fibrosis and has been involved with the charity since 2013. For multiple years Matthew has also been involved in the Red Cross Soup Patrol, delivering soup to Perth's disadvantaged and homeless.

Qualifications:

- Master of Accounting (Graduated with Distinction)
- Bachelor of Commerce (Graduated with Distinction)
- Professional Accreditation in Self-Managed Superannuation Fund
- Professional Accreditation in Margin Lending

Adviser Services:

- Superannuation
- Self-Managed Superannuation Funds
- Retirement planning
- Managed investment schemes including Managed Discretionary Accounts (MDA)
- Margin lending / Gearing
- Savings Plans, Deposit Products and Budgeting
- Life Insurance
- Managed Investments
- Securities, Derivatives and Bonds
- Estate Planning

Entrust Wealth Management

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