



GEORGE APOSTOLOU

PRIVATE WEALTH ADVISER

Enriching the lives of business owners, professionals, and successful families, by providing advice that gets them personally and financially well organised.



PROVIDING DIRECTION, CONFIDENCE AND CAPABILITIES

George is passionate about providing personalised financial advice and making positive impacts in his client's lives. His overall aim is to turn complexity into simplicity by offering both his insight and expertise to ensure the best outcome is achieved. George assists his clients to implement appropriate financial strategies to preserve their capital, grow their wealth and ensure their family wealth is maintained.

George believes in building open and longstanding relationships with his clients so he can truly partner with them over time. This allows him to make sure all advice is integrated and implemented effectively, and that his clients are empowered to manage all changes that happen along the way.

EXPERIENCE AND QUALIFICATIONS

Advanced Diploma of Financial Planning
Diploma of Financial Planning
Self-Managed Super Funds (Kaplan Professional)
Bachelor Science (BSc) (Macquarie University)

MEMBERSHIPS

Member of the Financial Planning Association (FPA) and upholds the Code of Ethical and Professional Standards



Collaborating with other service providers



Protecting families and individuals from asset dilution



Estate and Legacy Planning



Aim to preserve and grow wealth

GEORGE APOSTOLOU

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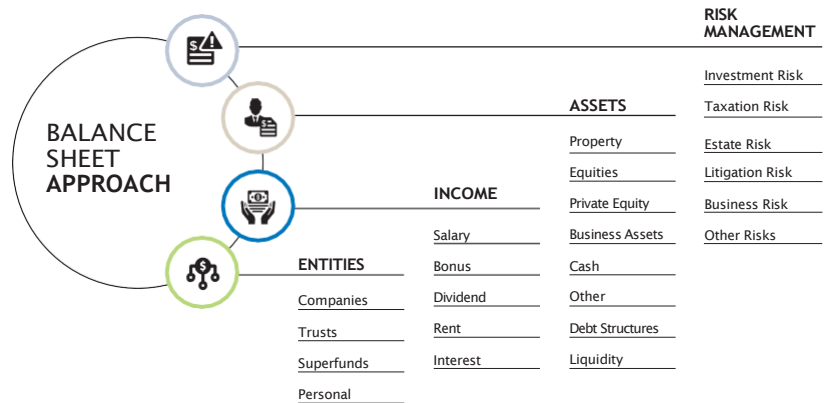


GEORGE APOSTOLOU
Senior Adviser

DIRECTION, CAPABILITY, CONFIDENCE

We provide advice to get business owners personally and financially well organised.

GOALS AND PLANNING



Alliance Wealth is a national advisory and wealth management firm which specialises in estate planning, wealth preservation, financial management strategies, and investment management.

Our clients are typically business owners, business leaders, successful individuals, families, and charitable foundations. Alliance Wealth has earned a reputation for unwavering commitment to these clients based on the core principles of genuine client advocacy, quality advice, and world class portfolio construction services.

TESTIMONIALS

“George Apostolou has been my financial advisor for well over a decade. In that time, I have been George’s client as he has moved from the financial planning arm of one of the major banks, through to a large financial services organization, and eventually into a practice providing bespoke advice.

I was impressed at our first meeting by the importance he placed upon understanding and managing risk versus reward in any financial decision, as to my mind this is the fundamental aspect of any investment strategy.

George’s performance as my financial advisor since that time has confirmed that he is diligent and thoughtful in his approach to my portfolio, prepared to put the client’s interest first if that was the best option in that situation.

He has demonstrated poise in situations of market turmoil, remaining focused and considered.

He can provide pragmatic and distilled advice based upon the large amount of information he keeps abreast of and is equally happy to provide detailed research on a given area if required.

I can give no better recommendation to George than my unhesitating decision to follow him as he has moved between his different places of practice over the years of our association.”

- Keith, Medical Specialist -

“George has been my financial adviser since 2015. I have a financial services background and have met many advisers, but George is the only one I trust; he always has my interests front and centre. My circumstances have evolved considerably over the years and George has always been able to ensure the best outcomes for me at each stage.

The latest stage has been the most crucial and George has been able to achieve far greater results than I could have anticipated. I have always been impressed by the breadth of George’s knowledge and how he keeps across the ever-evolving landscape – but George is not just technically brilliant, he has become a friend because he takes the time to really listen and understand. I highly recommend George – and do so to my family and friends.”

- Vanessa, Senior Business Banker -