PRIVATE
WEALTH
PARTNERS

Adviser Profiles

Provided by

Private Wealth Partners Advisory Pty Ltd ABN 54 645 661 123
Corporate Authorised Representative No. 001311680 (“PWPA”)
Private Wealth Partners Financial Services Pty Ltd ABN 42 690 715 774
Corporate Authorised Representative No. 001317371 (“PWPFS”)

As authorised representatives of:
PWP Advisory Pty Limited ABN 69 691 066 172
Australian Financial Service Licence No. 700170 (“PWP Advisory”)

To be read with the Financial Services Guide (Version 3.0)

ADVISER PROFILE

Anthony Smith



CFP®, BBus, JP

Authorised Representative Number 319962

Anthony has over 20 years' experience in financial services and whilst analysis and research are at the heart of Anthony's technical skills, it is having a deep understanding of his client's goals and objectives which he is passionate about.

Anthony is a Certified Financial Planner™ practitioner, has a Bachelor of Business degree (Applied Finance). He has completed the Self-Managed Superannuation Fund Specialist Advisor Program and the Stockbrokers Association Professional Diploma in Stockbroking. Anthony is a member of the Financial Advice Association Australia (FAAA).

Anthony is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation, Standard Margin Lending and Tax (Financial) Advice services.

Anthony is a salaried employee, a director and a shareholder of Private Wealth Partners Advisory Pty Ltd (PWPA) Corporate Authorised Representative Number 1311680. The relationship between PWP Advisory Pty Ltd (Licensee) and the PWPA is a cost sharing agreement. This agreement stipulates that 100% of remuneration is paid to PWPA. The Licensee will invoice the practice for their share of costs incurred in operating the licence. Anthony is also a director of PWP Advisory.

Referral Fees

Where we refer you to other product or service providers and you decide to purchase products or services from them, we may receive a payment as a result of our referral. If we receive a payment as a result of our referral, we will notify you of this within your advice document or by an alternative means provided in writing.

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ADVISER PROFILE

Ray Albrighton



BCom, DFP, CFP®, JP

Authorised Representative Number 441069

Ray has comprehensive experience in the financial services industry. For over 20 years Ray has worked in multiple positions as diverse as advising complex private clients, SME advisory and business coaching and leading a national retail advice team.

Ray's passion is engaging with private clients and business owners to provide extensive holistic and complex financials solutions. Ray continues to thrive on delivering bespoke outcomes for his clients and utilising his professional network to deliver remarkable results.

Ray is a member of the Financial Advice Association Australia (FAAA) and Certified Financial Planner®.

Ray is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, Gearing, MDA services, Managed Investments Schemes, Securities, Superannuation, Standard Margin Lending and Tax (Financial) Advice services.

Ray is a salaried employee, a director and a shareholder of Private Wealth Partners Advisory Pty Ltd (PWPA) Corporate Authorised Representative Number 1311680. The relationship between PWP Advisory Pty Ltd (Licensee) and the PWPA is a cost sharing agreement. This agreement stipulates that 100% of remuneration is paid to PWPA. The Licensee will invoice the practice for their share of costs incurred in operating the licence. Ray is also a director of PWP Advisory.

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ADVISER PROFILE

Damien Skidmore



B.Bus(Fin). DFP, JP

Authorised Representative Number 247043

Damien has a diverse and sophisticated background in financial markets. In 1990 he started work with Westpac Foreign Exchange monitoring foreign currency breaches in 'minor' currencies. In 1995 Damien took up a role as a futures trader and broker with the U.S merchant bank J.P Morgan. Damien was a registered representative of the Sydney Futures Exchange and a New York Mercantile Exchange trader (NYMEX Access).

This experience led to Damien starting his own trading business in 1998 as a 'local' trader on the Sydney Futures Exchange, trading mainly medium dated bond derivatives, currencies and equities. Damien commenced advising retail clients in 2002 as part of the Australian Unity Financial Planning license and was named the Australian Unity Financial Planner of the year in 2008, 2009 and 2010.

Damien has a Bachelor of Business (Finance), a diploma of Financial Planning (FPA), numerous trading and advising qualifications and is a member of the Financial Planning Association of Australia. Damien and Renaye have three young girls, Tara, Zoe and Emily.

Damien is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Standard Margin Lending. Your PWPG adviser receives 100% of all fees/commissions and pays Private Wealth Partners Group a monthly expense recovery.

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ADVISER PROFILE

Ian Smith



B.Comm, MEc, MAppFin
CA – Financial Planning Specialist
CFP – Certified Financial Planner
Authorised Representative Number 247709

Ian has over 25 years of successful business experience in finance, stockbroking, funds management and banking. He has worked in capacities of Finance Director, Strategy Director and Head of Private Stockbroking for one of the World's largest investment banks, Deutsche Bank.

Ian has experience in offering the full professional financial advisory services. This includes:

- Developing strategies to provide tax efficient income and capital growth for wealth creation, wealth retention, redundancy and retirement planning clients
- Creating comprehensive strategic financial plans and investment structures for individuals, family trusts, private companies and self managed superannuation funds
- Maximising tax saving opportunities and searching for low cost solutions
- Maximising superannuation opportunities within complex government guidelines, including advising on and establishing self managed superannuation funds
- Recommending appropriate investments to achieve clients' objectives
- Recommending risk management strategies and gearing opportunities
- Partnering with tax and legal experts to manage complex estate planning such as asset protection, minimising estate tax and wealth transfer issues
- Facilitating premium stockbroking services

Ian is a Chartered Accountant – Financial Planning Specialist and a Certified Financial Planner. He has attained the higher education degrees of Master of Applied Finance, Master of Economics, Bachelor of Commerce.

Ian is authorised to provide advice on Self Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Gearing, Life Risk Insurance Products, Managed Investments Schemes, Securities, Superannuation.

Ian is a salaried employee of Private Wealth Partners Advisory Pty Ltd. He may be eligible to receive a discretionary bonus if he meets the objectives set by his employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if he is to be eligible for a discretionary bonus.

ADVISER PROFILE

Jasmine Theophile



CFP ®, BCom, GradDip FP, FAAA Aged Care Specialist, JP
Authorised Representative Number 319963

Jasmine joined the Private Wealth Partners team in 2023 and joined the financial services industry in 2004. Jasmine has qualified as a Certified Financial Planner™ practitioner since 2010 and holds a Bachelor of Commerce degree, Graduate Diploma in Financial Planning and additional specialised qualifications in Self-Managed Superannuation Funds, Derivatives, Securities and Aged Care.

Jasmine is a member of the Financial Advice Association of Australia (FAAA) and is also accredited as an FAAA Aged Care Specialist.

Attention to detail and a holistic approach to financial planning are at the heart of Jasmine's personalised and tailored approach to each client that she advises.

Outside of work, Jasmine enjoys music, volunteering for charities and spending time with her family and friends.

Jasmine is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Derivatives, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation, Standard Margin Lending and Tax (Financial) Advice services.

Jasmine is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680) and may be eligible to receive a discretionary bonus if Jasmine meets the objectives set by her employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved to qualify for such amounts.

Jasmine is a shareholder of Private Wealth Partners Advisory Pty Ltd (PWPA). The relationship between PWP Advisory Pty Ltd (Licensee) and the PWPA is a cost sharing agreement. This agreement stipulates that 100% of remuneration is paid to PWPA. The Licensee will invoice the practice for their share of costs incurred in operating the licence.

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ADVISER PROFILE

Natalie Berrell



BCom, DiPFinPlan, DiP Fin & Mortgage Broking
Authorised Representative Number 1268606

Natalie joined Private Wealth Partners in 2017 after working at Macquarie Bank for a number of years. She has over 10 years' experience working in the banking Industry, bringing a diverse background of knowledge to financial services. Drawing on her experience across different relationship management roles, she understands the importance of solidifying trust, respect and approaching each clients' situation in a non-judgemental way. Natalie is passionate about improving her clients' financial literacy and believes this is key to achieving lasting financial stability.

Natalie has a Bachelor of Commerce, majoring in Finance and a minor in Commercial Law. She has a Diploma of Financial Planning, Cert IV in Finance & Mortgage Broking, is a member of the Financial Planning Association of Australia (FAAA) and a Justice of the Peace.

Natalie is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Tax (Financial) Advice services.

Natalie is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680) and may be eligible to receive a discretionary bonus if Natalie meets the objectives set by her employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved to qualify for such amounts.

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ADVISER PROFILE

Thomas Lyon



BCom (Acc & FinPlan), GDipPsych
Authorised Representative Number 1282369

Thomas started his journey into Financial Services from the ground floor. After being accepted into a graduate program he has worked his way through roles such as Client Service Manager, Paraplanner, Associate Adviser, before becoming a Financial Adviser. Progressing clients to a position where their assets can support part of, or the entirety of their lifestyle is a core driver for Thomas. When clients are in a position that they are confident their advisor is making the best decisions for them, they have the time to enjoy the things they value most in life, family, travel or their own personal ambitions.

Having completed a bachelor's degree in commerce, majoring in both Financial Planning and Accounting, Thomas has also completed a post-graduate in Psychology. Combining his background in Finance and Psychology he aims to truly connect on a personal level with each and every one of his clients and help them understand the way they think about their money.

Thomas is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Tax (Financial) Advice services.

Thomas is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680). He may be eligible to receive a discretionary bonus if Thomas meets the objectives set by his employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if he is to be paid such amounts.

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ADVISER PROFILE

Nicole Hibel



BBus, GradDip FP

Authorised Representative Number 1310194

Nicole joined Private Wealth Partners in 2020 as a Customer Relationship Manager and started her Adviser career in 2024.

Nicole has worked in the financial services industry for over 8 years, gaining experience in a range of areas including credit and lending, mortgage broking, stockbroking and superannuation. Wanting to combine her experience in various finance sectors, Nicole has progressed into the financial planning specialisation which has allowed her to take on a more holistic view of financial services.

Nicole has completed a Bachelor of Business, majoring in Finance, and also the Graduate Diploma of Financial Planning.

Nicole is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities and Superannuation.

Nicole is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680). She may be eligible to receive a discretionary bonus if Nicole meets the objectives set by her employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if she is to be paid such amounts.

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ADVISER PROFILE

Jack O'Donnell



BCom (Financial Planning & International Economics), JP
Authorised Representative Number 1311480

As a financial advisor, Jack is responsible for a wide variety of clients, including high net worth individuals, professionals, and business groups. Jack has been in the industry for over 5 years. He holds a Bachelor's Degree in Commerce, majoring in both Financial Planning and International Economics.

Jack believes there is value in simplifying what can often be complex life decisions for clients and uses this to provide holistic insight into the advice and investment process. With a strong foundation in financial planning and a passion for helping people achieve clarity and confidence in their financial future, Jack specialises in guiding clients through key milestones – whether it's entering the property market, planning for retirement, or building long-term wealth. His approach is grounded in building genuine relationships, understanding individual goals, and delivering tailored strategies that make a real difference.

Jack is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Tax (Financial) Advice services.

Jack is a director and a shareholder of Private Wealth Partners Financial Services Pty Ltd (Corporate Authorised Representative Number 1317371), receives 100% of all fees and commissions and pays PWP Advisory a monthly expense recovery.

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ADVISER PROFILE

Samantha O'Connor



GradDip Financial Planning

Authorised Representative Number 1317124

Samantha has been a valued member of Private Wealth Partners for over 10 years. She holds a Graduate Diploma of Financial Planning and has extensive experience across both client-facing and operational roles. This breadth of expertise has given her a strong appreciation for the importance of clear communication – both in understanding clients' goals and in keeping them informed about their financial affairs.

What motivates Samantha most is witnessing the life-changing impact that quality financial advice can have on individuals and their families. This inspires her to go above and beyond to deliver exceptional outcomes for every client she works with. Samantha prides herself on building close relationships with all of her clients.

Samantha is authorised to provide advice on Self-Managed Super Funds, Deposit and Payment Products, Debentures, Stocks or Bonds, Investment Life Insurance Products, Life Risk Insurance Products, MDA services, Managed Investments Schemes, Securities, Superannuation and Tax (Financial) Advice services.

Samantha is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680). She may be eligible to receive a discretionary bonus if Samantha meets the objectives set by her employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved if she is to be paid such amounts.

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ADVISER PROFILE

Craig Matthews



Dip FinPlan

Authorised Representative Number 240420

Craig Matthews joined Private Wealth Partners in 2025, bringing significant experience as a Risk Specialist. Since entering the financial services industry in 2000, Craig has contributed to various industry panels and advisory committees. Prior to commencing his financial services career, Craig served for eight years as an electronics technician within the submarine squadron of the Royal Australian Navy.

With over twenty years of experience advising both corporate and individual clients, Craig demonstrates comprehensive expertise across all areas of life insurance. He specialises in both personal and business risk insurance, and his professional network, including general insurance professionals and accountants has provided him with considerable exposure to the SME sector. Notably, Craig is highly experienced in keyperson insurance, including business succession (Buy/Sell) strategies, guarantor arrangements, and loan protection.

Outside of work, Craig enjoys spending time with his family, who share his passions for food, motorbikes, and sailing. He is actively involved in supporting various charities and has been a long-standing supporter of the Westpac Rescue Helicopter.

Craig is fully authorised to provide advice on all Life Risk Insurance Products.

Craig is a salaried employee of Private Wealth Partners Advisory Pty Ltd (Corporate Authorised Representative Number 1311680) and may be eligible to receive a discretionary bonus if Craig meets the objectives set by the employer. This includes objectives such as compliance, client retention revenue targets and other business objectives that must be achieved to qualify for such amounts.

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