



Brett Sydney-Smith
Financial Adviser

Brett's primary role is providing strategic advice and developing plans for our clients. Brett uses his technical knowledge to present information in a meaningful way to empower clients to make decisions.

Brett enjoys working with clients on a wide variety of strategies including transition to retirement, working with young families to put in place a Financial Plan, maximising cashflow, wealth accumulation and tax planning strategies for professional couples, retirement advice and Centrelink planning.

A secondary role is providing investment advice. As Unified Financial Services is not linked to any banks or institutions, Advisers have access to a wider variety of funds on our Approved Product List. As many of our clients hold Industry Super Funds our Firm is able to provide objective advice on a fee for service basis.

Brett has over 7 years of experience in the financial services industry. His qualifications include an Advanced Diploma of Financial Planning and a Bachelor of Business.

Brett is currently finalising his studies to obtain a Certified Financial Planner accreditation.

Brett is passionate about being a Financial Adviser as it provides him satisfaction and a great sense of achievement in assisting clients to reach their financial and lifestyle goals. He appreciates that being a Financial Adviser is a privilege and is looking forward to a long and satisfying career in the industry.

Through his previous employment at State Trustee companies (WA and Victoria) for over three years, Brett found his passion for Financial Planning and commenced in the industry as a Para Planner for a Financial Planning company in Melbourne. His move to Unified Financial Services was triggered by a desire to build client relationships and develop into a strategic Financial Adviser.

Brett moved to Melbourne in May 2007 from Perth. In the winter months Brett will spend a fair few hours at the MCG watching the footy and now that he has retired from cricket you will find Brett spending more time on the golf course in the Summer months.