

James De Petra



Financial Planner Profile

Extensive Experience

James has been employed and has been providing advice in the financial services industry since 2012.

James is based out of the Ringwood office where he is available to meet with clients. He also is available from the Melbourne office when required.

Qualified Professional

James is a member of the Financial Planning Association and his qualification include:

- Bachelor of Commerce (BComm)

James can help you

- Understand and meet your lifestyle and financial goals
- Understand age pension and other Centrelink issues
- Protect you and your family with personal insurance cover
- Maximise your retirement savings with tax effective strategies
- Create strategies for to start a family, your first car, home or investment property
- Manage debt more effectively
- Understand estate planning
- Monitor and update your financial plan as required by your changing lifestyle and personal circumstances

Specialist Advice

James is authorised to provide you with financial product advice and deal in the following financial products:

- Deposit accounts (bank accounts and term deposits)
- Managed investment
- Retirement products
- Superannuation
- Insurance cover

This profile is to be read in conjunction with the Financial Services Guide of MyLife MyAdvice.

James is the eldest of 9 kids and is happily married currently working on building a family. He enjoys the gym, the outdoors, spending time with family and friends and supports the Richmond Football Club.



James De Petra is an employee of Togethr Financial Planning Pty Ltd.

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