Entrust

Adviser Profile

Phil George

Director & Senior Investment Adviser
Authorised Representative (No. 458416)

Phil emphasises the importance of a team-based philosophy in combining Portfolio Management, Financial Planning and Portfolio Administration to create a comprehensive, bespoke financial solution for each client. The aim of this unique operating model is to deliver true value by allowing clients the time to focus on the important aspects of their lives, comfortable in the knowledge that their financial affairs are being professionally managed.

Beginning his career in Melbourne trading stocks on London and US markets, Phil returned to Perth with his young family in 2004 and spent the next ten years with Macquarie Bank. This saw Phil elevated to a Senior Advisor, then Associate Director before joining Entrust in 2014. Phil's knowledge and respected position within the investment community is reinforced by his regular guest appearance for various news outlets and weekly commentary on ABC radio.

Primarily a Private Portfolio Manager, Phil covers a full range of investment options, including Australian and international listed shares, bonds and high-yielding income investments. Phil's knowledge and experience is complemented by his support team's extensive background and skills in financial and strategic planning. Phil works with a wide range of individual clients whose primary goal is to have a focus on protecting and accumulating wealth, are typically time poor and prefer not to manage the day to day operations of their personal wealth.

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

Phil's services include advising and dealing in:

- Savings plans and deposit products
- Managed investment schemes including Managed Discretionary Accounts (MDA)
- Retirement planning
- Superannuation
- Securities, debentures and bonds
- Margin lending facilities

Phil's intimate knowledge and experience in investment markets combined with an ability to truly understand what his clients are trying to achieve allows him to deliver consistently strong performance and highly personalised service to each and every client.

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