**Ben Hilliard**

| | |
|---|---|
| Address: | 23 Copas Dr<br>Klemzig<br>SA 5087 |
| Contact Phone: | 0468 850 935 |
| Email Address: | benhilliard23@hotmail.com |


**Summary of Skills**

I pride myself on the service I provide to my clients. I am passionate about the value of financial advice and I have very good knowledge of financial planning strategies and the associated legislation. I have experience in dealing with high net wealth clients and am confident in providing advice to this type of customer. I am very personable, which has led to me building many quality relationships with clients, referrers and team members throughout my career.

**Client Service**

I meet with clients regularly to discuss their financial goals and put plans in place to achieve these goals. I have built a large base of ongoing clients and but also enjoy the opportunity to sell the value of my advice to new customers. I have been working at the Norwood and Burnside ANZ branches for the past 3 years and during this time I have had the opportunity to work with high net wealth individuals, understanding their advice needs and the strategies that work for them. I understand that every client is different and I can tailor my presentation and delivery of advice as required.

**Financial Planning Knowledge**

I am confident in presenting and discussing a wide range of financial advice strategies. I have experience in providing advice relating to risk insurance, superannuation, retirement planning, SMSF and investments. I understand the different types of investment structures that are available and in particular, those that suit high net wealth individuals. I am familiar with current legislation and how it impacts my clients and the strategies that I am recommending.

**Quality, Trusting Relationships**

Building quality, trusting relationships with key stakeholders has been the key to my success at ANZ Financial Planning. This has lead to me receiving a steady stream of quality referrals from bankers and lenders at ANZ. On a personal note, my experience playing and coaching cricket and being involved in the PACE program at ANZ has helped me to further understand the importance of building relationships and dealing with different personality types.

**Education**

University of Adelaide Coding Boot Camp, 2020

FASEA Ethics and Professionalism in Financial Advice, 2019

Advanced Diploma of Financial Services (Financial Planning), 2015

Diploma of Financial Services (Financial Planning), 2010

Kaplan SMSF Program, 2013

Diploma of Financial Services (Finance/Mortgage Broking), 2012

University of Adelaide, Bachelor of Economics, 2006

**Employment History**

Date: Jan 2014– Present
Company: ANZ Financial Planning
Title: Financial Planner
Duties: Providing high quality, compliant one-off and ongoing financial advice to my clients. The advice I provide in this role varies from risk insurance, superannuation, retirement planning, investment and SMSF. I have built trusting relationships with referral partners and this has been essential in ensuring that I receive a steady stream of high quality referrals. I am presently the 3rd busiest ANZ Financial Planner in Australia in terms of the amount of ongoing and upfront advice provided. Through my employment at ANZ, I have been fortunate to be involved in the PACE program, mentoring a disabled job seeker and the SA Future Leaders program, helping further develop my leadership skills.

Date: Sep 2009 – Dec 2013
Company: Gem Planning Pty Ltd (Accredited by AMPFP)
Title: Financial Planner
Duties: Meeting with clients, discussing their financial goals and implementing financial plans to achieve these goals. Having originally started at Gem Planning as a paraplanner, the role allowed me to gain an excellent knowledge of all aspects of the financial planning process. Within this role, I also completed my Diploma of Finance / Mortgage Broking, allowing me to become a qualified mortgage broker and provide lending solutions to clients that fit with their financial goals.

Date: Apr 2009 – Aug 2009
Company: Stafflex (Yorkshire, UK)
Title: Temporary Employee
Duties: A variety of temporary positions whilst in the UK on a working holiday.

Date: Oct 2006 – Mar 2009
Company: AAMI (Australian Associated Motor Insurers)
Title: Business Analyst
Duties: Analysing sales, claims and profitability data and making recommendations to management based on my results. The first point of contact in South Australia for any analysis of motor vehicle insurance data, such as, recommending price changes, profitability tracking and analysis of claims data. My successful business recommendations included targeting specific regions to improve new business sales and customer retention, altering the premium formula to maximise profitability and identifying vehicle types that required premium increases/decreases.

Date: 1999 - 2006
A variety of different roles whilst completing high school and university studies. These include customer service roles in retail sales and hospitality.

**Interests**

I am the current 1st Grade Coach at the Adelaide University Cricket Club.