



...looking ahead with you

pbd wealth management pty ltd

[www.pbd.com.au](http://www.pbd.com.au)

## PROFILE — TONY ROBERTSON

### Principal Activities

- Director of PBD Wealth Management P/L
- Investment Adviser and Fund Manager of Individually Managed Accounts (IMAs)
- Responsible for Research of Exchange Listed investments, Investment Strategy parameters, and approved investments.
- Superannuation Adviser including Self-Managed Super Funds
- Liaison with other Professionals and ASX Listed Investment product providers.

### Qualifications

Tony is a member of the Financial Services Institute of Australia (FINSIA) and the Self Managed Super Funds Professional Association of Australia (SPAA).

He is a Responsible Officer and an Authorised Representative of PBD Wealth Management Pty Ltd which holds Australian Financial Services Licence # 244394.

He has an accounting /economics degree from Macquarie University and a Master of Commerce from the University of Newcastle.

### Background & Experience

Tony has previous experience working for various large corporations mainly in finance roles. This has given him a broad knowledge in management, tax, finance, business planning and foreign currency issues which have since been applied to smaller organisations.

He worked as a consultant and practising accountant for 12 years and has been a Director of PBD Wealth Management since

1997. Over the past 15 years Tony has taken a keen interest in investment markets, financial planning, and the different options offered to consumers.

A current focus is to continuously review world investment markets and expert commentary to help assess options available for Australian based investors. In his role of overseeing PBD's investment approach Tony ensures its development is consistent with PBD's aim to be recognised as a high performance Investment Manager specialising in Exchange Listed investments and Foreign Exchange (FX).

Given recent world economic events Tony is analysing how best to help Australian investors position and manage portfolios in the years ahead given the changed operation of Central banks, Governments and investment market regulators world-wide.

Our response to the Global Financial Crisis (GFC) has been to narrow our focus and specialise. Our focus is Exchange Listed investments (not derivatives or futures) and offering an active, transparent approach to managing the liquid Exchange Listed portion of client portfolios. Accordingly we are able to work co-operatively with advisers who choose to specialise in other areas, and prefer to 'outsource' Exchange Listed investments to a specialist.

Tony has formed a view post GFC that actions being pursued by Governments, Central Banks and Regulators means an 'active' approach to asset allocation will work better. This involves regularly reviewing exposure to the broad range of asset classes available. The Buy and Hold approach is a past concept for PBD.

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