Fitzpatricks Private Wealth

LIVE LIFE ON PURPOSE

RANDALL STOUT
Principal Adviser

Helping you get financially organised & plan for the future

Randall's open and honest communication style has led him to establish positive and long term relationships with his clients. He strongly believes that financial advice is meaningless unless it is implemented with a level of strategic and personal interaction. Randall works in collaboration with his client's other trusted professional advisers to make sure things get done effectively and efficiently.

- Collaborating with other service providers
- Protecting families and individuals from asset dilution
- Estate and Legacy Planning
- Aim to preserve and grow wealth

EXPERIENCE AND QUALIFICATIONS

Over 20 years' experience advising clients

Recipient of the Financial Planning Association's National Certified Financial Planner Professional of the Year for 2014 Award

Practice owner

Certified Financial Planner (CFP®)

Certified Practicing Accountant (CPA)

Bachelor of Commerce

Registered Tax Financial Adviser

Fellow member of the FPA (FFPA)

CONTACT DETAILS

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WHAT WE DO
AT FITZPATRICKS

We run a family office arrangement coordinating all your financial affairs, getting you financially organised. When we invest, our goal is to maximise your returns for the level of risk you wish to take and aim to preserve your capital.

OUR ROADMAP
TO YOUR SUCCESS

STEP 1 DISCOVERY

Enrich your life by understanding where you are now.

Encouragement

Nurturing

Relationships

Interests

Career, Cash Flow & Capital Position (Net Worth)

Health

STEP 2 DESTINY

Create a vision of where you want to be in the next 3 and 10 Years?

Love, what are all the relationships in your life?

Live, how do you want to live your life?

Learn, what do you want to learn?

Legacy, what legacy do you want create?

STEP 3 DESIGN

Bring your **vision** to life by designing an action plan.

Destination

Estate planning

Strategies we use to achieve your 4 L's (love, live, learn, legacy)

Investment

Gaps that need addressing - Insurance needs & Retirement

Needs - cash flow to fund your roadmap

STEP 4 DECISIONS

We help you make **Decisions** and **ACT.**

Act on your decisions and

Commit to your plan in a considered

Timeframe

CLIENT
TESTIMONIALS

"Randall has been an asset to my small business. He is very easy to speak to and is always willing to share his vast financial knowledge whenever it is needed. I would recommend Randall to anyone who is requiring financial planning."

"Randall has provided financial advice to myself and my husband over a number of years.
I would not hesitate to recommend him. He is personable, very easy to deal with, explains things in plain English and has always been available when we have had any queries."

"Randall has made a significant contribution to our professional community through his leadership of the Perth Chapter of the Financial Planning Association."