Adviser Profile – James Shaw

Authorised Representative No. 1002228

I am an authorised representative of Wealth Effect Advisory Pty Ltd, AFS Licensee 514437.

I am employed by King Financial Group (VIC) Pty Ltd which is a corporate authorised representative of Wealth Effect Advisory Pty Ltd, representative No.398310

The services I can provide

- Wealth Creation
- Financial Planning
- Investment Planning
- Retirement Planning
- Superannuation and Rollovers
- Life and Disability Insurance
- Estate Planning
- Managed Discretionary Accounts (MDA)
- Aged Care

The Products I can advise you on

- Life Insurance
- Superannuation
- Self-Managed Superannuation Funds
- Managed Investments (including IDPS)
- Deposit Products
- Retirement Savings Accounts
- Government Bonds
- Estate Planning
- Securities
- Margin Lending

My education, qualifications and experience

- Accredited Aged Care Professional – Aged Care Steps, 2018
- SMSF Core Course – DBA Network Pty Ltd, 2017
- Bachelor of Commerce (Major in Financial Planning) – University of Canberra, 2011
- Margin Lending & Geared Investments – Kaplan, 2012

How to find us

Our office is located at:
Suite 2, Building B,
192 Burwood Road
HAWTHORN VIC 3122

If you would like an appointment to discuss your financial needs and objectives in more detail, please contact me by:

Phone: (03) 9999 2700
Fax: (03) 9818 4059
Email: james.shaw@kfgroup.com.au
Mail: PO Box 6083
HAWTHORN WEST VIC 3122

Our Team

Barry King – Senior Financial Adviser

Barry established King Financial Group in 1989 and is a highly experienced practitioner in the Financial Services Industry. Barry's commitment to helping people excel is reflected in the strong relationships he has with his clients.

Chantal Rosser – Senior Financial Adviser

Chantal has over 10 years' experience as a financial adviser and enjoys helping clients across a wide range of advice segments including aged care. Chantal holds a Bachelor of Commerce, Advanced Diploma of Accounting, Cert IV Mortgage Broking and is CFP qualified.

Jan Walsh – Client Service Administrator

Jan has been in the financial services sector for over 35 years and joined the KFG team in August 20016. Jan has a wealth of knowledge that she uses for all client enquiries and is committed to providing the best possible service.

Bonnie King – National Team Assistant

Following the completion of her Bachelor of Arts and Bachelor of Visual Arts degrees at Monash University, Bonnie joined the KFG team in 2010. Bonnie provides essential support to all offices and prides herself on providing quality service for all client enquiries.

Reg Galo – Client Service Administrator

Reg joined the KFG team in 2019. Reg is responsible for booking client review appointments, providing administrative support and ensures clients experience a high quality service.