

Steven Kwok**Dip FP, CA, BComm****CWP Solutions Pty Ltd | ABN 63 143 638 153**

If you would like to make an appointment, please contact my office on:

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Authorised Representative Number: 376429
Version 14/02/2025

Qualifications and experience

Steven has been a Financial Planner since 2010. His qualifications consist of Institute of Chartered Accountant (CA), Bachelor of Commerce and Diploma in Financial Planning.

Steven is the co-founder of CWP Solutions in 2010 with Tuan Hoang and the business is experiencing substantial growth, branching out to accounting, mortgage and property services.

As a Representative of Wealth Services Partners, Steven has access to high quality financial products, extensive market research & training that helps deliver premium services to clients.

Steven's focus has always been on providing exceptional customer service as well as holistic financial advice to grow and protect his clients' wealth. He has extensive experience and exposure to the many aspects of Financial Planning including wealth creation, super & retirement, Centrelink, personal insurance solutions and estate planning. In addition to this, with over 20 years of accounting knowledge, Steven with the ability to consider tax consequences on any advice provided.

Steven is a strong believer in educating clients, creating a trusting association and mutually honest communication with his clients. He considers this as vital to establishing and maintaining strong working relationships.

CWP Solutions Pty Ltd (ABN 63 143 638 153) (ASIC no 376428) is a Corporate Authorised Representative of Wealth Services Partners Pty Ltd (ABN 92 652 222 261) an Australian Financial Services Licensee (AFSL 535126).

Areas of advice:

Steven Kwok is an Authorised Representative of Wealth Services Partners and is authorised to provide financial planning advice in the following areas:

- Wealth creation
- Retirement planning
- Investments
- Personal life insurance
- Superannuation
- Corporate superannuation
- Centrelink planning
- Cash flow planning
- Basic deposit products
- Government debentures, stocks or bonds
- Managed investment schemes (managed funds) and investor directed portfolio services
- Retirement savings accounts
- Securities, including shares
- Superannuation products
- Self-managed superannuation funds
- Life insurance and risk products

Steven Kwok as an employee director and shareholder of Wealth Services Partners Pty Ltd and CWP Solutions Pty Ltd.