

**Tuan Hoang****Dip Acc, Grad Dip FP, Master of FP****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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|----------------|---|
| <b>Address</b> | Office 2, 420 Spencer Street, West Melbourne VIC 3003 |
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**Authorised Representative Number:** 414173  
**Version:** 14/02/2025

**Qualifications and experience**

With nearly two decades of experience in financial planning, Tuan has been helping individuals and families build, protect, and manage their wealth since 2005. His extensive qualifications include a Diploma in Accounting, a Diploma and Advanced Diploma in Financial Planning, a Postgraduate Diploma in Financial Planning, and a master's in financial planning.

Tuan began his career with Westpac, working across multiple locations before moving to Commonwealth Bank. After years of working in the banking sector, he chose to become an independent financial adviser to provide truly client-focused advice tailored to individual needs.

His expertise spans all areas of financial planning, including wealth creation, superannuation and retirement strategies, Centrelink benefits, personal insurance solutions, and estate planning. Tuan is committed to delivering holistic financial advice and exceptional customer service, ensuring his clients feel confident and secure in their financial future.

As a strong advocate for trust and transparency, Tuan believes in fostering long-term relationships built on open communication and integrity. His goal is to empower clients with the right strategies and knowledge to achieve financial success.

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

**Areas of advice**

Tuan Hoang 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

Tuan Hoang is an employee, director and shareholder of Wealth Services Partners Pty Ltd and CWP Solutions Pty Ltd.