Prestige
WEALTH PARTNERS

ADVISER PROFILE

SIMON D YOULTON

MBA CMgr FCMI,
AdvDip.FS(FP)

FINANCIAL ADVISER AND WEALTH CREATOR

SIMON D YOULTON
MBA CMgr FCMI,
AdvDip.FS(FP)

OVERVIEW

With a career spanning over two decades in the financial services industry, in jurisdictions from the UK to Australia, Simon is a visionary leader and experienced Financial Adviser with a deep-seated commitment to financial education, equality, and empowerment.

Simon's work extends beyond traditional wealth management, touching on critical aspects such as superannuation awareness, budgeting, risk management, and creating a culture of financial well-being as part of a holistic approach to wealth building.

Over the years Simon has worked in mergers and acquisitions, advising private clients, and has been a founding director of multiple Financial Advisory companies globally. Simon is an advocate of financial vulnerability and passionate about financial education as he truly believes that knowledge and awareness are key to unlocking financial potential and safeguarding against vulnerability.

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Suite 2A, 2 Gemstone Boulevard, Carine WA 6020
Tel: 08 9301 2075

E-mail: simon.youlton@prestigewealthpartners.com.au
www.prestigewealthpartners.com.au

YOUR ADVISER & PRACTICE

Simon is a Sub-Authorised Representative (No. 1236457) of Prestige Holdings Pty Ltd T/A Prestige Wealth Partners is a Corporate Representative (No. 1295707) of Capstone Financial Planning Pty Ltd. ABN 24 093 33 969. Australian Financial Services License No. 223135.

Prestige Wealth Partners established in Perth, Western Australia is a privately owned boutique Australian wealth advisory firm. Our reach extends across the nation, where we serve a diverse clientele with unparalleled dedication. Our foundation is built on the principles of bespoke financial strategy, rigorous advocacy for financial literacy, and relentless fight against financial vulnerability.

The team at Prestige Wealth Partners ensures your financial dreams are nurtured, cultivated, and transformed into a tangible reality.

MEMBERSHIPS:

Simon is a Chartered Manager & Fellow of the CMI (FCMI) and abides by their code of professional conduct and ethics.

QUALIFICATIONS:

- Advanced Diploma of Financial Planning (AdvDip. FS)
- Triple Accredited Masters in Business Administration (MBA)
- Cambridge University Pre-Seed to Exit funding Programme
- Oxford University Executive Leadership Programme
- Harvard Business School Sustainable Business Strategy
- Postgraduate Diploma in Management
- Financial Abuse Specialist ™ – Certified
- Studies towards a Masters in Financial Planning

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ADVICE YOUR ADVISER CAN PROVIDE

SIMON IS AUTHORISED TO PROVIDE ADVICE AND DEAL IN THE FOLLOWING FINANCIAL PRODUCTS:

- Life Products including Investment Life Insurance Products & Life Risk Insurance Products
- Interests in Managed Investment Schemes including Investor Directed Portfolio Services
- Deposit & Payment Products
- Retirement Savings Accounts ("RSA") products
- Superannuation (excluding Self-Managed Super Fund)
- Standard Margin Lending Facility
- Debentures, Stocks or Bonds issued or proposed to be issued by a Government
- Securities - This authorised representative is only authorised to give class of product advice in relation to securities

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PRESTIGE WEALTH PARTNERS ADVICE FEES AND CHARGES

- Simon will be paid by Financial Planning Advice Fees as described in the Financial Services Guide. The amount of the benefit and how it is calculated will be advised to you during your initial meeting.
- Simon's fee for the preparation of a Statement of Advice and other Advice documents will vary depending on the complexity involved and the time taken. You will be notified of the costs involved prior to the commencement of any work.
- Simon provides the option of ongoing reporting and advisory services. This fee will vary depending on the complexity involved to manage your portfolio moving forward. You will be notified of the cost involved prior to the commencement of any ongoing services.
- Prestige Holdings Pty Ltd T/A Prestige Wealth Partners pays a fixed licensing fee to Capstone Financial Planning Pty Ltd and will receive all revenue earned from the financial services provided to you. Simon is the CEO of Prestige Holdings Pty Ltd T/A Prestige Wealth Partners and will receive a salary/benefit from this company.

OTHER BENEFITS SIMON MAY RECEIVE

From time to time Simon may be invited to social or sporting events and receive the occasional gift such as a bottle of wine or hamper on special occasions. These non-cash benefits will have a value of less than $300. A register listing the details of any non- cash benefits between $100 and $300 is maintained. These invitations and gifts do not influence the advice provided to you. If you would like more information you can request a copy of the register.

Level 1, 607 Bourke Street
Melbourne Victoria 3000
1300 306 900
www.capstonefp.com.au