Daniel Ardern

With five years of experience as a financial advisor in the UK, Daniel made a significant life change in 2020 when he decided to follow his wife here to her hometown, Brisbane.

Seeking to immerse himself in the provision of complex strategy advice within a new jurisdiction of legislation and regulations, Daniel joined Aspire Retire in 2021.

Daniel's approach to financial advising is deeply rooted in goal-based advice. Recognising the importance of understanding his clients' aspirations and objectives, he is committed to building tailored strategies that align with their unique goals.

With his strong orientation towards goal-based advice, Daniel aims to empower clients to make informed financial decisions, guiding them on a path towards achieving their desired outcomes while navigating the ever-changing landscape of financial legislation and regulations.

Qualifications

Daniel holds a Bachelor of Art (Honours) majoring in Economics and an Advanced Diploma in Financial Planning. He was also recognised as a Chartered Financial Planner in the UK. Dan is currently completing his Certified Financial Planner® (CFP) studies – recognised as the highest professional designation within the Financial Advice Association Australia.

Experience

Daniel has been working within the financial planning industry since 2012 and during this time has provided strategic and investment advice across two jurisdictions providing him with an intimate knowledge on some of the complexities and pitfalls of cross-border advice.

Specialisation

Daniel has a unique specialisation in repatriation and cross-border advice and how it may impact your financial situation in Australia. In addition to this, Daniel provides advice to a diverse range of clients requiring assistance in areas such as wealth creation, tax minimisation, pre-retirement and retirement planning, debt management and estate planning.

Memberships

Daniel is a member of the Financial Advice Association Australia (FAAA).

aspire retire® WEALTH ADVISORY | clarity direction confidence