

## “Financial Advice for busy Professionals”

**Navigate Wealth** is a leading, independently-owned, advisory practice. No matter what stage in life you are at, we will help you navigate the current economic waters – giving you confidence and peace-of-mind in your financial future.

Navigate Wealth advisors will mentor clients on their wealth creation journey with the utmost integrity, with a long term focus and commitment to help our clients achieve their potential.



### Advisor Profile

## Peter Alvarez



Bachelor of Applied Finance  
Diploma of Financial Services  
(Financial Planning)  
Post Graduate Diploma of Financial  
Planning

Fellow -Financial Services Institute of  
Australia  
SMSF Specialist Advisor™- Self  
Managed Super Funds Professionals'  
Association of Australia  
Justice of the Peace (NSW)

Peter is the founder and director of  
Navigate Wealth. Prior to establishing  
Navigate Wealth, Peter worked as a  
Financial Adviser for a number of  
boutique financial planning practices  
across Sydney. Prior to that, he

worked for one of Australia's largest  
fund managers.

Peter's decision to establish his own  
Financial Advisory practice was a  
result of his genuine passion for  
helping clients achieve their financial  
and lifestyle goals in a manner  
consistent with his strong ethical  
values ensuring at all times the advice  
given is in his client's best interests.

It is the desire to give standout advice  
that drove Peter to become one of  
the 2% of advisers in the market place  
who are also a Licensed Property  
Buyer's Advocate. This enables Peter  
to give his clients advice on direct  
residential and commercial real estate  
as part of their portfolio.

This client focused approach to  
providing advice is what has made  
Peter and Navigate Wealth a leading  
financial advisory practice it is today.

Peter works closely with other  
professionals, such as tax advisers,  
solicitors, mortgage brokers and real  
estate professionals to ensure each  
client maximises their wealth building  
potential. This allows his clients to  
focus their energy and time on other  
aspects of their life such as their  
career, business and family.

For a complimentary consultation  
contact

**Peter Alvarez**  
**Director & Financial Adviser**  
**SMSF Specialist Advisor™**

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