

“Financial Advice for Doctors, Dentists and Medical Professionals”

Navigate Wealth is a leading, privately-owned by staff, self licenced 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.



Adviser 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
Specialist Adviser- Self Managed
Super 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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