# Introducing Michael Clapham

"It is not necessary to do extraordinary things to get extraordinary results"

Warren Buffet

**Michael Clapham**
B.Bus, Dip FP, Dip FS, CFP®
Fellow Tax Institute

I am committed to guiding professionals, business owners, individuals, couples and families who want to build wealth, gain control of their finances and have a financial roadmap for the future.

I have a long track record of success and can help you to:

- Achieve your financial goals
- Realise your wealth potential
- Attain a clear path to financial security
- Have enough money to do the things you want to do
- Make your retirement dreams become a reality

At Antipodean Advisory, I have over 25 years of experience within the financial services industry, and have focused on investment products which have created value for clients and provided lasting returns. Our mission at Antipodean Advisory is to remain committed to helping all clients understand their options within an often complex financial world, removing risk while working towards a secure financial future.

My path to becoming a financial planner became clear a number of years ago when the global financial crisis of 2008 struck most economies. This was a particularly difficult time for the financial services sector, and made many people question what financial advisers were achieving personally and professionally.

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My interest in the financial sector began when I was working at a senior level as an investment banker. Although I had gained a significant amount of experience while in this position, I was not content with my job. I loved the subject matter but yearned to be doing something more fulfilling, such as helping people directly, as opposed to through a financial institution. It occurred to me that becoming a financial planner would enable me to collectively use my skills, while helping people at the same time.

I joined a fellow financial planner who believed in the same values I held myself. Since that change in my career, I have not looked back and have seen my personal satisfaction grow daily. I thrive in an environment where I am able to assist people in reaching their wealth potential.

All my clients receive highly-personalised financial advice, dedicated to growing and protecting personal wealth. When you choose Antipodean Advisory you can have confidence, knowing that your financial affairs are managed professionally without complexity, giving you real peace of mind.

Knowing that my experience and passion can bring positive results and peace of mind to my clients is what excites me about being a financial adviser. I believe my past experience with selling a myriad of financial products has enabled me to have a solid foundation for the work I do as a financial planner.

I go above and beyond what is set by the industry and considered the minimum standards. I work with you on the best product or solution to meet your specific requirements.

This involves taking the time to listen carefully, understanding your real aspirations and needs, and then developing a tailored, financial and lifestyle plan. With my extensive financial background in various global investment bank roles, along my accounting and taxation experience, I'm able to design unique and truly effective solutions. You can feel confident in my ability to guide you to solve these problems.

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## Over the years, my expertise has been honoured with remarkable and notable accolades, including:

**Qualifications:**

- Bachelor of Business Studies in Accounting and Finance - Massey University
- Conversion of my New Zealand Accounting degree to Australian standards.
- Diploma in Financial Markets - AFMA
- Diploma in Financial Planning – Kaplan
- Certificate IV Training and Assessment – Western Institute TAFE
- Accredited Listed Product Adviser Program– Kaplan
- Margin Lending and Geared Investments Accreditation– Kaplan

**Professional Memberships:**

- Fellow of the Tax Institute
- Registered tax agent - Tax Practitioners Board

**Awards I have won for products issued to the market:**

- 4 industry awards for best retail structured product across four different categories – Pacific Prospect and the Asset Magazine.
- Won best structured retail product – The Asset Magazine

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## Three things about me and my experience that might surprise and delight you

**I specialise in and have extensive experience in the following areas:**

- Investment advice and portfolio management
- Cash flow management and budgeting
- Superannuation advice (including SMSFs)
- SMSF compliance and administration
- Planning for your retirement (including assessing social security eligibility)
- Business succession planning
- Small business structuring and establishment
- Wealth protection and personal insurance strategies
- Risk management
- Equity markets domestic and international
- Debt markets, government, semi government and corporate bonds and floating rate notes in domestic and international markets.
- Structured and hybrid investments

## My roles within financial services:

- **Sales** – fixed income: bonds, government, semi-government, corporate.
- **Bonds** –credit structured, derivatives, CDOs. Spot FX and forward FX to professional fund managers and wholesale clients.
- **Sales**– equities, managed funds, fixed income, credit, FRNs, term deposits, derivatives and equities.
- **Product development** – equities, equities derivatives, credit, commodities, fixed income, commodities, structured credit.
- **Management** - director and management roles in the above.

  I have also provided guidance and advice to a range of professsional money managers, including Fixed Income, Corporate Credit and Structured Credit providers, as well as a range of Direct Equity Product Developers.

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Clients say remarkable things about the impact my work has on their life and financial success. Example comments include:

*"I have been incredibly satisfied with the service Michael has provided for the past three and a half years. I have the greatest confidence in his straightforward advice and have no doubt whatsoever that his advice is directed to what is in my best interests."*

*"Michael has in excess of one million dollars of mine under his control and this will continue to grow and produce income. Under his guidance, I would have no hesitation in recommending Michael and the advice he provides."*

**John C**
**Retired Judge**

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*"I had been apprehensive about the risk of investing in shares or wealth portfolios but Michael tailored a plan specifically to match my risk profile. My cash is now earning significantly more than it was in term deposits and low interest bank accounts, while still giving me the security of a medium risk portfolio."*

*"I have already recommended Michael to friends as he doesn't just provide a one size fits all offering, he takes the time to get to know your individual financial situation and create a realistic but challenging plan to ensure your money will work well for you. It has given me peace of mind as I no longer worry that I'm missing out on wealth creation."*

*My money is working for me without me having to do anything. We also did a restructure of my superannuation and insurances to ensure I'm protected for the future as well."*

**Ruth,**

**Chief Financial Officer**

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*"We came to Michael to help guide us in our early years as a couple, to help make sure we are set up correctly for our older years. We are in it for the long haul, however once meeting with Michael I was really surprised with the short-term impact he has had."*

*"As the main decision maker in our household, Michael has helped ease a lot of stress and pressure I was feeling from making all the big calls. I would say this is one of the most valuable things I receive from his guidance. It's like having a top player, and he's on the bench and I get to call him up to play whenever I need; and it leads to all the right goals."*

*"I couldn't recommend Michael more. Always ready to explain things simply for us, gives us multiple options and most importantly, works to our goals. Not just a general plan for wealth, I feel our journey with Michael is personalised, ready to grow and adapt with us. It's a team."*

**Alysia & Simon,**

**Branding/Packaging Designer & Service Manager**

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# Further Information

Learn more about me and Antipodean Advisory by contacting us today.

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Antipodean Private Pty Ltd trading as Antipodean Advisory (AFSL547263)

Michael is a director of Antipodean Private trading as Antipodean Advisory (AFSL 547263)



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