"A deep understanding of each client allows me to tailor meaningful, achievable goals and strategies knowing they will be happy not only with the journey... but the ultimate destination."

Tony Sarai

Executive Planner

RJS WEALTH MANAGEMENT

Tony is an Executive Planner with RJS Wealth Management and has experience that spans in excess of 20 years. His personal philosophy is to be wholly committed to every client, regardless of their financial position, and to establish lasting relationships based on strong rapport and an appreciation of the client's personal financial 'appetite'. Fully understanding each client is imperative, not only in terms of their financial goals, but who they are, where they've come from and what they believe in. "A deep understanding of each client allows me to tailor meaningful, achievable goals and strategies knowing they will be happy not only with the journey ... but the ultimate destination

Tony takes great pride in the transparency of the RJS Wealth Management Group methodology and focus on client education. With a better understanding of the opportunities available, clients are well positioned to make informed financial decisions every step of the way. This approach ensures that every client is educated about how strategies are selected and more importantly, why they are recommended. This means clients are closely tied to the process and fully understand the value of what is being put forward. Tony believes the time invested in this process is invaluable in providing clients with an immense level of comfort and ensures that every decision is a joint one made in an open, trusting environment.

The respect Tony has earned from clients is apparent from the depth and experience of his client base which includes international equities traders to senior executives from the financial services sector itself.

These clients identify with Tony as a consummate professional whose commitment and genuine concern has positioned him at the forefront of the industry. Tony's experience, combined with an ability to meticulously research market options, ensures only the most appropriate options are recommended to clients and he can discuss investment philosophies 'hand on heart' knowing they are made with the utmost care and responsibility.

Qualifications

- Graduate of Australian Institute of Company Directors
- Executive Program in Leadership
- Bachelor of International Business
- Bachelor of Commerce (Banking & Finance)
- Certified Financial Planner
- Diploma of Financial Planning

Professional Memberships / Achievements

- Associate Member, Self-Managed Super Fund Association
- Member, Financial Planning Association of Australia
- Member, Australian Institute of Company Directors

Achievements

- Barron's Top 150 Financial Advisor

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