



"Tailored, specialist advice
for each and every client"



Jeff Ebsworthy

Senior Financial Adviser

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Jeff Ebsworthy is a respected senior financial adviser at EKO Financial on the Sunshine Coast. His central goal is simply to help his clients to make smart money decisions so that they can live the life they want.

Jeff's clients include business owners, professionals and retirees.

An established business adviser and Accountant since 1995, his expertise extends well beyond the numbers. Jeff became a Financial Adviser in 1997 and a CPA Accountant in 2002.

Drawing upon his accounting and business experience, Jeff encourages his clients to be proactive and take the necessary steps to mitigate financial risks by implementing sound financial planning decisions.

Using a disciplined, repeatable and tax effective process, Jeff creates a sustainable financial 'habit' for his clients to live by, both now, and later in retirement.

Financial education and mentoring are the cornerstones of his approach. He helps his

clients to understand that wealth and financial security allow choices in life, and having money is not an end in itself.

Jeff takes responsibility for interpreting the complexity commonly associated with financial matters to empower financial confidence and decision making. He understands that while financial planning is a key element, it must be considered within a bigger picture.

Jeff's approach is inclusive. He collaborates with his clients' advisers and facilitates introductions to aligned professionals to offer a truly comprehensive and integrated financial planning solution.

He supports individuals who strive to elevate their wealth and assists business owners to merge long-term business goals with their personal wealth strategy. Jeff does this through financial leadership and sharing his considerable financial knowledge.

Significantly, Jeff firmly believes in personal

protection advice. He asserts that protecting wealth from the effects of ill-health and serious injury is paramount. His duty of care, and first priority, is to assist clients so that they are appropriately covered in their time of need and well represented during the claim process.

Jeff is a constant throughout his clients' lives. He calmly steers many through the varied challenges faced by business owners and professionals, including when they enter retirement. He helps family business owners and parents to protect their livelihood and create financial security for their children and future generations. Further, Jeff understands the sensitivity required for meeting financial obligations and fulfilling wishes following the loss of a partner.

Jeff revels in his clients' stories - their latest overseas adventure, arranging the rig to set off around Australia or the financial contentment they feel being able to simply potter around at home or be actively involved in their community. The joy his clients experience as financial objectives come to fruition is a source of genuine satisfaction.

Personally...

Jeff is caring and generous. Thorough, level-headed and a clear communicator, he is open-minded yet cautious, genuinely interested in people and he likes to have fun. (His co-workers allude to a repertoire of 'dad-jokes'!)

Born and raised in the coastal suburb of Swanbourne WA, it stands to reason that Jeff is most at home in the ocean. A resident of the Sunshine Coast since 2002, Jeff is a keen surfer and an active member of the Alexandra Headland Surf Life Saving Club, a community that he calls family.

Married to Kerry whom he met in England (where he worked as a carer), he returned to Australia to study and change career to accounting and later financial planning. Together they have raised four children.

Jeff's work has taken him to Mackay, Toowoomba and Brisbane before settling on the Sunshine Coast, so it stands to reason that Jeff has a broad geographical spread of clients. Naturally outgoing, he has a genuine sense of community and clear desire to make a difference.



Qualifications

Bachelor of Business (Accounting)
Certified Practising Accountant (CPA)
Certificate of Public Practice (CPA)
Self-Managed Superannuation Accreditation
ASX Listed Securities Accreditation
Graduate Diploma of Financial Planning
Enrolled Nurse

Professional Memberships

CPA Australia

Community

Member of Alexandra Headland SLSC
(Best Patrolling Member 2014/15)
Surf Lifesaving Bronze and Silver Medallion
First Aid
Former Finance Officer for Netball Queensland
Administrator in Disability Care Facility