TCA Financial Planners

your partners in financial planning

Accredited by
AMP Financial Planning | AMP

Introducing TCA Financial Planners

TCA Financial Planners (TCA) are an award winning practice and have been providing financial planning advice to clients for over four decades.

We have a long history of developing excellent working relationships with our clients to provide comprehensive financial advice based on their individual needs and goals.

Whether it be planning for your retirement, saving for your first home or insurance for life's unexpected events we have your financial planning and mortgage broking requirements covered.

We believe that clients need a financial planner that they trust, and somebody who takes the time to understand their goals and aspirations while simplifying the complexity of financial planning advice.

Ben Watts

Ben Watts is the Practice Principal and owner of TCA Financial Planners having taken over from Tony Case in 2017. Ben joined **TCA** as a Financial Planner in 2010 and in 2012 was awarded the **AMP New Planner of the Year Award** for QLD.

Ben is married, and along with his wife and 2 children is a very active member of the local community. He is a professional and passionate advocate for his clients to ensure they continue to reach their financial goals.

Tony Case

Tony Case began in the financial planning industry back in 1975 after migrating from the UK in 1974. He was the founding Practice Principal of **TCA Financial Planners** and continues to be actively involved in the practice today.

Tony has seen many changes in the past 40 years as a financial planner and is proud to be a part of the continued and positive change in the industry.

Larnie Watts

Larnie Watts is a part owner of TCA Financial Planners along with her husband Ben Watts and has been involved in the Practice for more than 5 years.

Larnie fulfils a number of roles within the practice, including Practice Manager and Financial Planner. As a mother of 2 high school age children, she understands the pressures that modern families face and enjoys looking after clients and making sure they are financially secure.

Jaxon King

Jaxon King joined TCA in 2015. He has more than 10 years experience in financial planning, and was the youngest ever graduate to complete the MLC Adviser Scholarship program in 2012.

Jaxon is a keen surfer and is passionate about his involvement in a variety of charities. Jaxon is well placed to look after clients from the young professional space to retirees.

Andrew Middleton

Andrew Middleton joined TCA in 2016 following a 21 year career in the Australian Defence Force both in uniformed and civilian roles.

Andrew has built an impressive portfolio of personal investments and his first-hand experience will ensure his clients receive advice that is both practical and professional making him a valuable asset to our team for both your Financial Planning and Mortgage Broking needs.

Steve Brooke

Steve Brooke joined TCA in 2013 and services clients throughout the Gold Coast area. Steve has been in the financial services industry for nearly three decades. He has been an AMP financial planner since 2011.

Steve enjoys helping his clients to achieve their financial goals. He is also an Accredited Mortgage Consultant (AMC) for those clients looking for a new home loan or refinancing of their existing loans.

Karen Howes

Karen Howes joined TCA in 2015 and became a qualified Financial Planner in 2017. She is married with a young family and understands the obstacles and challenges facing families in reaching their financial goals.

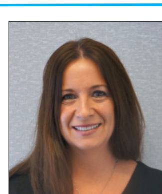
Karen enjoys working alongside her clients to ensure they continue to meet their financial goals throughout the different stages of life.

Our Administration Team

The administration team at TCA Financial Planners are generally the first point of contact for our clients. With many years of experience between them, our team works closely with the Financial Planners to ensure that the advice process is an enjoyable experience for you. TCA's continued success would not be possible without the support of this efficient and dynamic team.

Terry

Jenny



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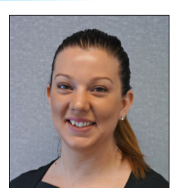

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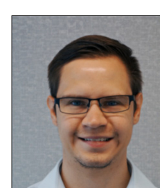

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The Importance of a Financial Planner

We understand the importance of our clients securing their financial futures. Our role is to ensure clients remain on track to meet their financial goals by making sure that their existing products remain relevant and cost effective over time. We also assist clients to understand and navigate the complexity of legislation and Government changes, and the impacts they may have on their personal situations. We also provide assistance with your insurance requirements, whether it be making sure you are covered for life's unforeseen events or assistance with the claims process to make this as stress free as possible.

How Will You Benefit?

By working closely with us we can provide you with a range of strategies including:

- Retirement Planning Advice
- Mortgage Broking
- Savings and Investments
- Age Care Advice
- Centrelink Assistance
- Budgeting
- Risk Insurance Advice
- Ongoing investment portfolio review and management