

alex morris

B. Comm, Grad Dip FP, CFP, SSA



CERTIFIED FINANCIAL PLANNER™



SMSF SPECIALIST ADVISOR™

empowering your financial evolution™



Alex is Director and founder of Mammoth Financial Pty Ltd. He is responsible for its growth and expansion through his vision, energy and leadership.

Alex has practiced in the financial planning industry since 2000. A combination of extensive Financial Planning knowledge and a true passion for developing meaningful relationships allow him to provide the highest level of tailored financial advice – enabling clients to make smart decisions on the road to financial security.

Alex established Mammoth Financial as a boutique financial planning firm with the sole purpose of providing flexible, innovative and individual tailored solutions to clients. Through his experience Alex has repeatedly found that lasting relationships based on mutual understanding and respect result in the best outcomes for clients.

Alex's qualifications and professional recognitions include:

- » Millennium3 – NSW Professionalism Award 2014
- » Millennium3 – NSW Financial Planner of the Year 2014
- » Millennium3 – NSW Professionalism Award 2013
- » Millennium3 – National Professionalism Award 2012
- » Millennium3 – Galaxy of Stars 2013
- » Millennium3 – NSW Professionalism Award 2012
- » Millennium3 – National Professionalism Award 2011
- » Millennium3 – National Young Adviser of the Year Award 2009
- » Millennium3 – National Professionalism Award 2008
- » Self Managed Super Funds (SMSF) Association – SMSF SPECIALIST ADVISOR™
- » Financial Planning Association (FPA) - CERTIFIED FINANCIAL PLANNER™
- » Securities Institute of Australia – Graduate Diploma in Financial Planning
- » University of New South Wales - Bachelor of Commerce (Finance & Marketing)

Prior to establishing Mammoth Financial in 2007, Alex worked with ING (OnePath), Aradlay, Wilburtins McDonald & Austbrokers, where he acted as Responsible Officer as well as managing a large portfolio consisting of over 600 personal clients, 100 corporate super funds consisting of approximately 4,000 fund members.

Alex's interests include surfing, cycling, photography, travel and the natural environment. Alex's interest in the natural environment and desire to preserve it resulted in the selection of the company name 'Mammoth'.



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