



**LOWE
LIPPMANN
TRAKMAN**
FINANCIAL SERVICES

WE ARE COMMITTED TO EMPOWERING AND HELPING YOU TO MAKE SMART DECISIONS WITH YOUR MONEY.
BY CHALLENGING YOUR TODAY WE WILL REDEFINE YOUR FUTURE.



NATHAN TRAKMAN

B.Com, CA, Dip. FS (Financial Planning)

FINANCIAL ADVISER

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NATHAN, A QUALIFIED CHARTERED ACCOUNTANT, HAS BEEN IN THE FINANCIAL SERVICES INDUSTRY SINCE 1987 AND IS A DIRECTOR OF LOWE LIPPMANN TRAKMAN FINANCIAL SERVICES. NATHAN SPECIALISES IN PROVIDING STRATEGIC FINANCIAL PLANNING ADVICE, WORKING CLOSELY WITH INDIVIDUALS AND BUSINESSES, TO ACHIEVE THEIR ULTIMATE FINANCIAL GOALS.

PROFILE

Nathan started his own financial planning business after arriving in Melbourne in June 2000. In 2004 he acquired a very well-known and established local Caulfield business and became sole principal of Grauman & Trakman Financial Planning. In 2013 Grauman & Trakman merged with Lowe Lippmann Trakman Financial Services where Nathan is a Financial Adviser and Director.

Nathan works closely with each of his clients, designing strategic financial plans specific to their needs, to help bridge the gap between where they are now and where they want to be.

In addition to his financial planning expertise, Nathan has an excellent understanding of the Personal Insurance arena, helping to manage his clients' personal risk and disability

exposure thereby ensuring a holistic service is provided to his clients.

Nathan has also been instrumental in the establishment of many corporate Superannuation plans.

EXPERTISE

Nathan specialises in Financial Planning and Personal Insurance encompassing advice across:

- Strategic Planning and Structuring;
- Superannuation Strategies;
- Wealth Creation and Tax Effective Strategies;
- Retirement Planning;
- Investment Planning;
- Personal Insurance;
- Partnership Buy/Sell Strategies; and
- Key Person Insurance

QUALIFICATIONS

Nathan has a Bachelor of Commerce and a Diploma in Financial Planning. He is also a Chartered Accountant and a member of the Financial Planning Association.

PERSONAL

Away from work, Nathan's personal interests include various sports, in particular soccer, and he is a proud sponsor of North Caulfield Junior Maccabi Soccer Club.

Nathan also enjoys a strategic game of chess.