

Dr. Dennis J. Maddern



MADDERN
FINANCIAL ADVISERS

Dr. Dennis J. Maddern
Maddern Financial Advisers Pty Ltd
ABN 83 104 046 657
AFS Licence No. 332556
Suite 238, 29 Milton Parade
Malvern Vic 3144
T: +61 3 9999 7200
M: 0412 160 553
E: dennism@maddernfinancial.com.au

Academic Qualifications

- Bachelor of Science (Business / Education)
- Master of Arts (Organisational Improvement)
- Master of Theological Studies
- Master of Financial Planning
- Doctor of Philosophy (Business / Organisational Behaviour)
- Certified Financial Professional CFP®
- SSA™ SMSF Specialist Adviser
- Fellow- Australian and New Zealand Institute of Insurance and Finance (ANZIIF)
- Fellow - Chartered Financial Practitioner FChFP
- Fellow – Financial Services Institute of Australasia (FINSIA)
- Fellow - Certified Insurance Professional CIP

Affiliations and Memberships

- Australian and New Zealand Institute of Insurance and Finance (ANZIIF)
- The Financial Advice Association Australia (FAAA)
- Financial Services Institute of Australasia (FINSIA)
- Profession of Independent Financial Advisers (PIFA)
- Self-Managed Super Fund Association (SMSF Association)

Recognitions and Awards

- 2009 AFA Australian ‘Student of the Year’
- 2010 AIOFP Australian ‘Adviser of the Year’
- 2012 Wealth Professional Magazine – Top 3 Advisers in Australia
- 2014 IFA Magazine – ‘Financial Adviser of the Year’ – Finalist
- 2015 IFA Magazine – ‘Boutique Financial Advice Firm of the Year’ – Finalist
- 2017 Optus My Business Award – ‘Finance Business of the Year’ – Finalist
- 2018 IFA Excellence Awards – ‘Holistic Advice Firm of the Year’ – Finalist
- 2018 IFA Excellence Awards – ‘Best Client Servicing (Company)’ – Finalist

Career Overview

Dr. Dennis J. Maddern (Dennis) is an Internationally recognised Certified Financial Professional (CFP®) and a Fellow Chartered Financial Practitioner (FChFP). These two designations are the ultimate in international recognition for financial advisers. Equally, Dennis holds the prestigious SSA™ designation from the Self-Managed Super Fund Association of Australia (SMSF Association) which is the paramount recognition for SMSF advice specialists in Australia, and allows Dennis to advise on all aspects of SMSFs creation, administration, and investment strategies.

Dennis holds significant academic qualifications: Bachelor of Science, three (3) Master degrees, and a Ph.D. from the University of Oklahoma and Post Doctorate studies from Stanford University

In addition to Dennis' impeccable academic qualifications and international designations, he is also an award-winning financial adviser. In 2009, he was awarded nationally the 'Student of the Year' by the Association of Financial Advisers (AFA). In 2010, Dennis was honoured nationwide with 'Adviser of the Year' by the Association of Independently owned Financial Professionals (AIOFP). During 2012, Dennis was respected with a designation in the top 3 Financial Advisers in Australia, by renowned Wealth Professional magazine. Dennis was a finalist in the 2015 SMSF Adviser of the Year award and a 2016 national finalist in the prestigious Optus My Business awards. Dennis and Maddern Financial Advisers were also nominated as finalists in the 2020 IFA Excellence Awards for Holistic adviser of the year and Holistic firm of the year.

Maddern Financial Advisers - 100% Independent, Section 923A (s923A) of the corporations act

Dennis founded Maddern Financial Advisers in 2003, and currently leads the Maddern Financial Advice team. He is a member of the Profession of Independent Financial Advisers (PIFA) and one of only 60 advisers in Australia that are 100% truly independent, in accordance with Section 923A (s923A) of the corporations act - something he is incredibly proud of.

Dennis is an internationally recognised speaker and consultant. His doctoral thesis on Organisational Change at the University of Oklahoma, USA, and post-doctoral work at Stanford University, led to a range of top management positions with leading international companies. With his specialised business knowledge and deep financial industry experience, Dennis assists Maddern Financial clients to focus on their wealth and financial health goals.

Whilst working and studying in the United States, Dennis played professional tennis, gaining All-American consideration. He also played Linton Cup for Victoria, was a member of the Australian Junior Davis Cup Team. He is a three times winner of the Kooyong Club Championships (1984, 1994 and 1995), and has represented Australia in international Master's World Titles on four occasions.



Maddern Financial Advisers Pty Ltd

Our Beginning

Maddern Financial Advisers was established in 2003, when we identified the need for successful professionals to receive strategic financial advice and high level analysis from an independent financial advice firm with the technical ability of a large firm, but the care and service level of a boutique firm. Throughout its history, Maddern Financial Advisers has been honoured with many awards, most recently being named as a finalist in the prestigious Boutique Advice Firm of the Year.

Industry Specialists

Our business has attracted a team of industry specialists who are committed to the highest standards of professionalism, integrity, and client focus. With a Chartered Accounting firm, a dedicated SMSF accounting team and a mortgage broker, we offer our clients a complete holistic advice service tailored to their individual needs. We also have an extensive network of other professionals that we utilise and refer to, where our clients need assistance outside the scope of what we do.

100% Independent – The Gold Standard of Financial Advice

Unlike most Australian financial advice firms, Maddern Financial Advisers isn't wholly or partly owned by a bank or other financial institution. This means we're under no pressure to recommend particular products. We work on a strictly fee-for-service basis – we don't accept benefits from product manufacturers in return for use of products. In other words, we don't serve two masters: when you become our client, we work for you and only you.

Financial Advice

Our value

Dennis provides clients with wealth creation advice, utilising a broad range of investment, superannuation and tax-effective strategies. His proven approach across a diverse client base, is consistent and superior. Long-term investment success is gained through diversification across all domestic and international asset classes and styles of investment management.

Ongoing Client Care

Dennis and his team have a philosophy of client care, which is reinforced by regular quarterly, half-yearly and annual one-one-one reviews. Dennis also makes time to personally attend to clients who require additional advice or services.

Service Excellence

Dennis prides himself on superior customer service, which is customised to meet specific needs and lifestyle circumstances. His proven investment strategies are drawn from a wealth of knowledge, primarily gained through years of experience in advising and improving business performance for multinational and global corporations alike.