Adviser Profile

Paul Nevin

Director | Financial Planner

MFinPlan, CFP®, CFP™, SSA®

1 April 2026

Profile

Paul has over three decades of experience in Wealth Management and Business Development. Paul is also a qualified UK Pensions Transfer Specialist.

Paul holds UK CFP™ and Australia CFP® certification, the only globally recognised mark of excellence in financial planning. Paul also holds the Chartered Wealth Manager and Chartered Fellow (Financial Planning) UK certifications via Chartered Institute For Securities & Investment.

These certifications provide you with the confidence that you will be dealing with an industry qualified, highly experienced and trustworthy individual.

Paul has worked with a wide range of clients and referral partners both in Australia and overseas. His methodical and detailed methods ensure the financial complexities in his clients' lives are effectively managed to ease their financial stress.

Your Adviser & Practice

Your adviser Paul Nevin is an Authorised Representative (No. 1261220) of TWD Licensee Services Pty Ltd (ABN 88 605064 480 AFSL 475964) and is employed by Expert Pensions Advice Australia Pty Ltd (T/A the UK Pension Experts), a Corporate Authorised Representative (No. 1293865) of TWD Licensee Services Pty Ltd.

Memberships

- Financial Advice Association Australia - FAAA
- The Chartered Institute of Securities and Investment – CISI
- Self-Managed Super Fund (SMSF) Association

UK Qualifications

- BA (Hons) Economics – Manchester Metropolitan University
- Diploma in Financial Planning – Chartered Insurance Institute (CII)
- Diploma in Financial Planning- Level 6- (CISI)
- Certificate in Pension Transfer Advice (CII)
- Pension Transfers & Planning Advice – (CISI)
- Award in Pensions Update (CII)
- Certificate in Discretionary Management (CII)
- Certificate in Securities Advice and Dealing (CII)
- Financial Planning Certificate (CII)

Australian Qualifications

- Master of Financial Planning (MFinPlan)
- Graduate Diploma in Financial Planning (GradDip FP)
- Advanced Diploma of Financial Planning (ADFP)
- SMSF Specialist Advisor (SSA®)

Advice Your Adviser Can Provide

STRATEGIES

- Investment strategies
- Budget and cash flow planning
- Superannuation advice, including salary sacrifice and consolidation strategies
- Personal insurance strategies
- Centrelink / DVA advice
- Retirement planning advice
- Estate planning advice
- Advice on ownership and structures e.g. discretionary and family trusts, Self-Managed Superannuation
- Portfolio review services
- Ongoing advisory services
- Referrals to specialists e.g. accountants, solicitors, mortgage and general insurance brokers
- UK Pension Transfers

PRODUCTS

- Investment life insurance products
- Interests in managed investment schemes, including investor directed portfolio services (IDPS)
- Retirement savings accounts
- Superannuation
- Deposit and payment products
- Listed Securities
- Recognised Overseas Pension Scheme (ROPS)

How Expert Pensions Advice Australia is Paid

TWD Licensee Services initially receives all fees received from clients and product providers and distributes 100% to Expert Pensions Advice Australia Pty Ltd. Expert Pensions Advice Australia Pty Ltd pays the Licensee a fixed monthly fee.

How Your Advisor is Paid

Paul is paid a salary and may participate in bonus arrangements.

How are You Charged for Advice?

Initial Meeting

Our initial meeting is free of charge. After the first meeting, your financial adviser will discuss the fees and charges that will be applicable to your individual circumstances.

Advice & Service Fees

We only charge a fee where we believe we can add significant value to our client's affairs. The fee is always quoted in advance and is based on the time and complexity of all the work that we are assigned to undertake as part of our relationship.

First year fees for the cost of research, strategy development, advice preparation and implementation generally range from $5,500 to $33,000 depending on complexity.

The fees for providing our ongoing professional services to you will also depend on complexity but generally range between $5,500 and $33,000.

UK Pensions Transfer Project Management Services

We can project Manage the Transfer of your UK Pensions into the Australian Superannuation System. We liaise with Expert Pensions Advice Australia Limited in the UK and Cooper Partners Services Pty Ltd here in Australia, to execute their recommendations of the Transfer of your UK Pension via their individual Statements of Advice. Our pension transfer project management fee is 1% of the pension transfer balance. For example, if your transfer balance is $500,000. Our fee will be $5,000.

Other Benefits, Interests or Associations

Paul has equity in Expert Pensions Advice Australia Pty Ltd and as a shareholder he may receive capital and profit related benefits.

Do any relationships exist which might influence the service or advice I receive?

Nevin Capital Finance Pty Ltd as Trustee for Nevin Family Trust is also a 50% shareholder and director of Expert Pensions Advice Australia Pty Ltd. Expert Pensions Advice Australia Pty Ltd (The UK Pension Experts) and Expert Pensions Advice LLP - UK have an arrangement in place whereby each entity may refer a UK expatriate for (UK or Australian) regulated financial advice. No referral fees are paid under this arrangement.

Nevin Capital Finance Pty Ltd as Trustee for Nevin Family Trust is shareholder of Expert Pensions Advice Australia Pty Ltd and may benefit from this arrangement through the receipt of capital and profit distributions. TWD Advisory Pty Ltd part of The Wealth Designers Group of companies is also a shareholder of Expert Pensions Advice Australia Pty Ltd and as a shareholder it may also receive capital and profit related benefits.

This document, the Adviser Profile, should be read in conjunction with the Expert Pensions Advice Australia Pty Ltd Financial Services Guide (FSG).

Distribution of this Adviser Profile by the Authorised Representative/ Adviser has been approved by TWD Licensee Services Pty Ltd.