

AMA Financial Planning: 25+ Years of Trusted Financial Advice for Australia's Health Professionals



Perth, Western Australia Jul 9, 2025 ([Issuewire.com](https://www.issuewire.com)) - With over 25 years of experience, **AMA Financial Planning** continues to serve as a specialist financial advice and brokerage firm tailored to the unique needs of medical and healthcare professionals across Australia

Dedicated to the Medical Community

As authorised representatives of Hartley Financial Pty Ltd (AFSL 480751), [AMA Financial Planning](https://www.amafinancialplanning.com.au) focuses exclusively on doctors, nurses, allied health professionals, and medical entrepreneurs. Their deep understanding of industry-specific challenges—from fluctuating incomes and rigorous education loans to complex tax and superannuation needs—sets them apart

Comprehensive Financial Services

AMA offers a full suite of advice and brokerage services, including:

- **Wealth Creation & Investment Planning:** Tailored strategies, diversification, and discipline-based investing

- **Superannuation Solutions:** Specialized funds and strategies designed for medical practitioners
- **Retirement Planning:** Ensuring secure, comfortable retirements through proactive planning
- **Income & Wealth Protection Insurance:** Safeguarding earnings and assets with purpose-built solutions
- **Debt Management:** Structuring both “good” and “bad” debt to support sustainable financial health
- **Estate Planning:** Arranging smooth legacy transitions and effective asset protection

Personalized 5-Step Planning Process

Clients benefit from a structured yet flexible pathway:

- **Complimentary Initial Consultation**
- **Strategy Development & Advice Documentation**
- **Plan Presentation**
- **Implementation of Advice**
- **Regular Reviews & Adjustments**

This holistic process ensures guidance remains aligned with each client’s evolving career and personal goals.

Expert Team Behind the Service

Led by Advice Licensee and Relationship Manager **David Hartley**, supported by Senior Financial Adviser **Briony Gouldthorp**, Paraplanner **Cheryl Martin**, and Client [Services](#) Associate **Eint Bo**, the team delivers deep expertise and genuine care in financial planning.

Accessibility & Client Support

Operating from Nedlands, Western Australia (12–14 Stirling Hwy), and reachable at **1800 262 346** or advice@amafp.com.au, AMA readily offers flexible access—phone, video, or in-person appointments—to suit busy professionals. Complimentary tools like online calculators and real-time “Wealth Report” modeling further support informed decision-making

Thought Leadership & Insights

AMA Financial Planning also publishes timely news and analysis on topics such as legacy planning, holiday budgets, and super vs property investments—most recently covering the \$150 b inheritance boom in Australia (1 July 2025)

[About](#) **AMA Financial Planning**

AMA Services (WA) Pty Ltd (ABN 47 008 671 458) is an authorised representative of Hartley Financial Pty Ltd (ABN 22 124 384 274), holding AFSL 480751. Based in Nedlands, WA, they deliver trusted, high-quality financial advice and brokerage services to Australia's medical and healthcare professional community



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Source : Ama Financial Planning

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