



# Phil McGilvray

Financial Coach & Financial Well Being Expert

## Experience and Awards

- 2018 Winston Churchill Fellowship Recipient (Financial Literacy)
- 20 + years Financial Coaching
- 15 Years Financial Planning and Stockbroking
- 5 years Partner at Morgans Financial

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## Qualifications

Advanced Diploma of Financial Services (Deakin University / Kaplan)  
Bachelor Applied Science in Occupational Therapy (Sydney University)  
Master of Exercise Physiology and Sports Science (Sydney University)  
Graduate Diploma Human Resources Management (ANU / CIT)

## Biography

A former partner in one of Australia's leading stock broking and financial planning firms, Phil spent 15 years working as a financial adviser before stepping away from the industry in 2016 to focus on financial coaching and education.

Phil has been passionate about teaching people the basics of financial management ever since his Grandma taught him to budget using glass jars as a teenager. Over the past 20 years Phil has had the opportunity to coach over 500 couples and individuals and teach thousands more through workshops and online courses.

In 2018 Phil was blessed to be awarded a Winston Churchill Fellowship to research financial literacy and financial wellbeing programs and initiatives around the world.

The Churchill Fellowship gave Phil the opportunity to meet with government officials, policy makers, charities, educators, podcasters, program developers and researchers.

Following his research trip, Phil has had the opportunity to speak to organisations and at conferences all around the world on the topic of financial literacy and financial wellbeing.

Phil has a passion for making money simple and is on a mission to equip people with the practical knowledge and money skills they need to live their lives and pursue their dreams free of money worries...

Experience has taught Phil that when he helps people thrive financially, he is also helping their relationships, their health, their productivity at work, their joy for life and their ability to be generous.

Phil and his wife Lianne are committed Christians and are on a mission to give a million dollars over 10 years to provide fresh water, sanitation and education to third world countries.

Phil is married to the gorgeous Lianne, they have 3 beautiful teenagers - Hannah, Holly and Lachlan; a Kelpie called Scarlet and 3 mini lop rabbits.

When he is not working Phil loves long distance running, fishing, holidays by the beach and eating chocolate!