

Kylie Wright



Wealth Management Partner

With 30 years of experience in the financial services industry, Kylie Wright is the Wealth Management Partner at Ulton, Head of Ulton Wealth, and a Certified Financial Planner® with a Master of Financial Planning. Since joining Ulton in 1999, she has built the firm's comprehensive wealth management division.

In Kylie's eyes, the real value of money is the choice it affords. This is a truism she knows from her own experience and one that's been continually validated across her decades of advising clients. Born in Townsville, much of Kylie's early life was spent on dairy farms and a remote cattle property. Growing up in an environment where flood, fire, and drought constantly threatened her family's way of life, she learned at an early age the value of choice—and the hardship of its absence. However, it wasn't until her young adult years that she became acutely aware of the correlation between finance and freedom. While living in the US playing basketball, she became a single mother and went through a period of living in poverty.

"When you're living in poverty, things can quickly become catastrophic. To me, having no money means having no choices in the way I manage life—a life that is stressful and precarious as a result," she explains. Determined to take control of her destiny, Kylie launched into developing her own financial literacy, and on the way, discovered a passion for helping others take control of their financial futures too.

Led by her guiding philosophy—hard work deserves success—Kylie's driving force is her desire to make sure her clients see tangible rewards for their efforts and sacrifices. This overarching vision influences the way she approaches financial planning.

Taking a holistic approach, she deep dives into all aspects of her clients' financial and family structures to understand their complete position. Kylie believes that by being empowered with the whole view of her clients' situations, she is able to provide advice that is truly tailored, aligned, and designed to maximise legislative opportunities.

A specialist member of the SMSF Association of Australia, Kylie has deep technical expertise in the area of SMSFs. Her expertise ensures that her clients understand their estate planning and capacity planning, where her focus is on protecting her clients' legacies and ensuring their wishes are respected, even in difficult circumstances. By combining her technical expertise with a deep understanding of what success means through the eyes of each individual, Kylie helps her clients manage life's complexities with confidence and clarity.

Known for her ability to navigate complicated financial structures and family dynamics, Kylie finds the hands-on nature of her role incredibly rewarding. As the trusted advisor in her clients' lives, being in the room to have the hard conversations and work through big life events is an honour she doesn't take lightly. Her ultimate goal is to empower her clients to make confident, informed decisions that secure their financial futures and give them the freedom to live life on their own terms.



Qualifications

- Master of Financial Planning
- SMSF Specialist Advisor™
- CERTIFIED FINANCIAL PLANNER®
- Certificate of Margin Lending
- Certificate of ASX Securities
- Certificate IV Finance and Mortgage Broking

Memberships

- Specialist, SMSF Professional Association of Australia Ltd
- Affiliate, Institute of Chartered Accountants
- CFP®, Financial Advice Association Australia (FAAA)

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