



ADVICE SERVICES AUSTRALIA PTY LTD

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What Our Clients and Other Professionals Say About Us

From Our Clients

"We find all of this financial stuff so overwhelming. You make it seem so easy - you explain things to us so that we are comfortable and able to understand. You are there with the answers whenever we have a question. It is reassuring to know that you are looking after us and our money."

Fred and Thelma (2017)

"We are thankful for all of the work you do for us. It gives us peace of mind to know that you are looking after things and we can call you when we have a question about our super."

Hilary (2017)

"We had been putting off seeing a planner to discuss our retirement for ages. It all seemed too hard and we were worried about what they were going to say. You presented everything in a way we can understand, told us exactly what to do and why we should do it. We now feel reassured about our retirement position. Thank you."

Gary and Lisa (2017)

"I wasn't sure about this whole financial planning thing... But I'm so glad I took the time to get advice. I understand heaps more about my tax and super now. And can see that my retirement plans are on track."

Ray (2016)

"We are so happy we met you. We have met a lot of financial planners who just seemed to want to sell us a product. You actually really listened to what we were after and showed us how it's possible without over complicating things or charging us big fees."

Anita and Michael (2016)

"Thank you. We feel so much more comfortable and confident with our financial position and future retirement plans."

Jeff and Di (2015)

From Industry Professionals

“Cath is amazing. She came into our business through a difficult time, when our workload was impossible. Her knowledge and calm resolve to get into the job, with little guidance, was a relief and she just got the job done. I would recommend Cath to anyone seeking a professional and experienced person that will make a difference to your business.”

Julie Foster – Formerly Head of Advice, Equity Trustees (2015)

“Cath produces high quality Statements of Advice that demonstrate care and attention to detail. She is helpful, efficient and very professional in her approach. Cath has a high degree of technical knowledge which is invaluable and her passion and dedication to doing what she loves, shines through in her work. I would highly recommend Cath Sharples-Rushbrooke.”

Belinda Lundberg – Finance Specialist, Next Level Finance (2014)

“Catherine is an excellent and experienced communicator and trainer who has a passion for the financial planning industry. Catherine has been involved in a number of different roles as a sessional lecturer within the La Trobe Business School including running lecturers and seminars, marking and curriculum development. Catherine interest and passion in the financial planning industry was always evident in terms of the commitment she brought to her work.”

Marc Olynyk – Senior Lecturer in Financial Planning & Superannuation (2014)

“Cath has worked on several projects for Money101 as an expert eLearning content writer. Cath's knowledge of the financial services industry is exceptional and a genuine value-add to our business. She is efficient, reliable and a pleasure to work with.”

Donna Ewing – Formerly Education Manager Money101 (2014)

“I have previously worked with Catherine on a consulting assignment with one of my most valued Wealth Management clients. Catherine is true wealth management professional, with a broad range of skills and she proved to be highly capable and adaptable. Her technical knowledge and client relationship skills are of the highest standard, and she always displayed a positive, can do attitude. I would have no hesitation recommending Catherine to any potential client or employer. Both my client and I look forward to working with Catherine again.”

Matt McGilton – Director Kaizen Recruitment (2014)

“I was introduced to Catherine is committed, driven, thoughtful, flexible and a joy to work with. Her understanding of client first was refreshing and her contribution was extremely valuable.”

Ric Zanetti – Principal Zanetti Recruitment & Consulting (2014)

“Catherine is a dedicated and very intelligent financial planning professional. She displays a high level of technical aptitude and professionalism at all times. Catherine's work is of the highest standard and she is thorough in her research of technical issues, presentation of material and displays a mature approach to any task. Catherine is a high achiever and exceeds expectations in all tasks that she undertakes.”

Lea Schodel – Financial Wellbeing Specialist + Ambassador for Women in Advice (2014)